Banner Student General Student Training Workbook

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Revision History Log

Publication Date	Summary
October 2008	New version that supports 8.1 software.
May 2009	Add Athletic Compliance

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Introduction

Course goal

The goal of this workbook is to provide you with the knowledge and practice to create and modify student records. This workbook is divided into these sections:

- Introduction
- Set Up
- Day-to-day Operations

Course objectives

In this course you will learn how to

- create and modify current information for students
- change a student's major
- change a student's residency
- change a student type
- enter information on career choice
- add advisors
- add activities
- add veteran information
- enter student classifications
- enter cooperative information
- enter Student Right to Know information.

Intended audience

Personnel responsible for creating and modifying current student information

Prerequisites

To complete this course, you should have

- completed the Education Practices computer-based training (CBT) tutorial “Banner 8 Fundamentals,” or have equivalent experience navigating in the Banner system
- completed the Curriculum, Advising, and Program Plan training workbook
- completed the General Person training workbook
- administrative rights to create the rules and set the validation codes in Banner.

To complete the exercises in the Day to Day Section of this workbook, you will also need to ensure that the rules and validation codes in Banner needed for the General Student module and the Curriculum, Advising, and Program Plan (CAPP) module have been set up for you.

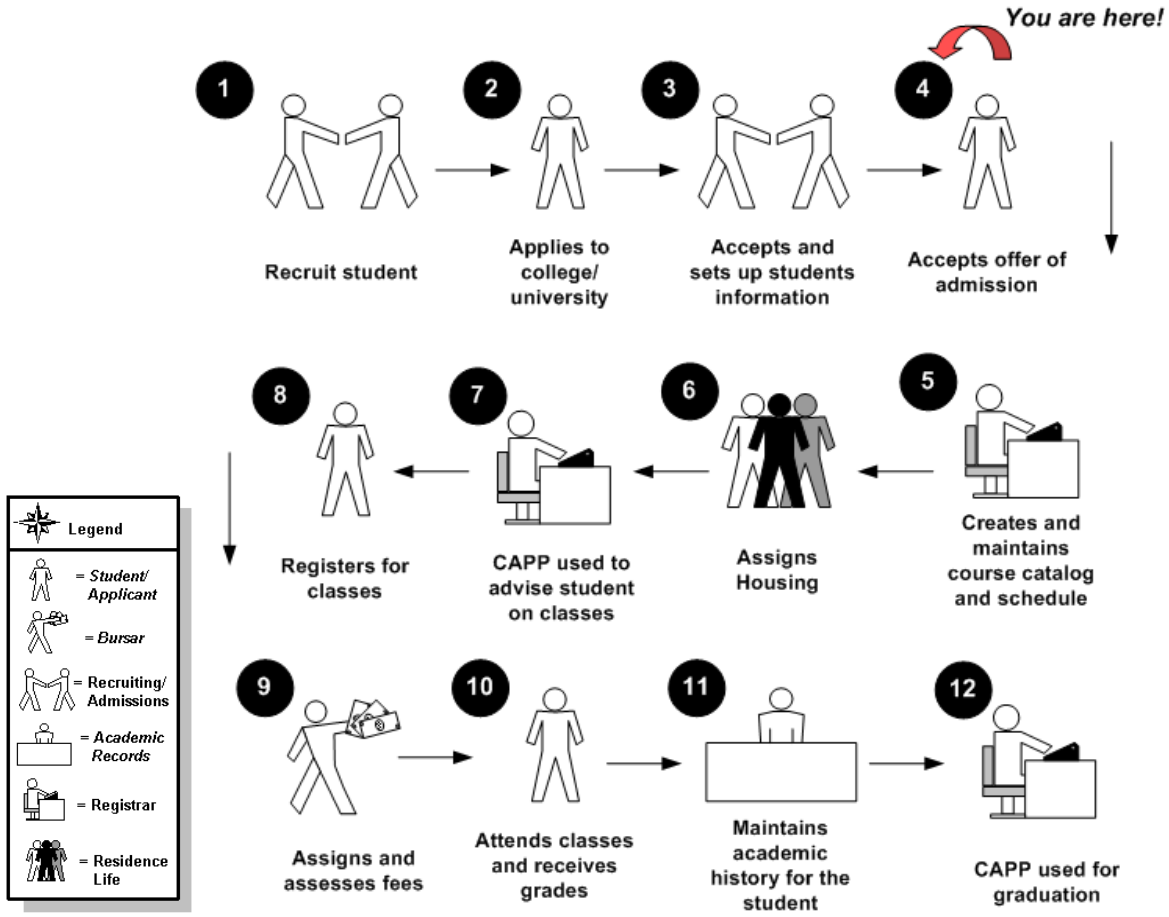
Process Introduction

About the process

An active General Student record is required before a student is able to register for classes and be assessed tuition and fees. Banner will review the student characteristics during registration to ensure that the student is eligible to register and to ensure that the student register's into the correct courses.

Flow diagram

This diagram highlights where the General Student Module process occurs within the overall Student process.



About the process

- Validation forms are set up on the Banner system. Unless a new code is required, this step is only performed once.
- Rule forms are set up for specific terms and can be either copied as is to a new term or changed for subsequent terms.
- The person/employee may view, save, and print online output.
- Parameters validation criteria are defined for generating the General Student Job Submission processes and reports.

Set Up

Section goal

The purpose of this section is to outline the set-up processes and detail the procedures to set up your Banner system.

Objectives

In this section you will learn how to create the rules and set parameters used to process student data.

Validation Forms Used in the General Student Module

List of validation forms

Before performing day-to-day activities related to General Student, a number of forms require your organization's data to be entered first. The following validation forms are used in the General Student module. Review these forms and practice entering information in each.

Note: Some of these validation forms are shared by various Banner systems. You should coordinate with other Banner system users at your institution when deciding what codes are used.

The forms are listed below in alphabetical order by Banner Name for reference purposes; it is likely you may set them up in a different order from how they are listed here. They are covered in detail on the pages that follow.

Form Description	Banner Name
Student Activity Code Validation	STVACTC
Advisor Type Code Validation	STVADVR
Student CARE AFDC Duration Validation	STVAFDC
Academic Standing Code Validation	STVASTD
Attribute Validation	STVATTR
Student Attribute Code Validation	STVATTS
Block Code Validation	STVBLCK
Campus Code Validation	STVCAMP
Combined Academic Standing Code Validation	STVCAST
Cohort Code Validation	STVCHRT
Class Code Validation	STVCLAS
Comment Type Code Validation	STVCMTT

Form Description	Banner Name
Communication Plan Code Validation	STVCPLN
Cohort Reason Code Validation	STVCREA
Contact Type Code Validation	STVCTYP
Student CARE Number of Dependents Validation	STVDEPS
Disability Type Code Validation	STVDISA
Degree Level Code Validation	STVDLEV
Employer Code Validation	STVEMPL
Eligibility Validation	STVELIG
Education Opportunity Prog/Serv Status Validation	STVEOPS
Eligibility Factor Validation	STVESEL
Level Code Validation	STVLEVL
Student CARE Marital Status Validation	STVMARS
Medical Code Validation	STVMEDI
Progress Evaluation Code Validation	STVPREV
Appointment Result Code Validation	STVRSLT
Athletic Attribute Validation	STVSAAT
Athletic Eligibility Validation	STVSAEL
Athletic Qualifier Status Validation	STVSAQS
Athletic Competition Reason Validation	STVSARE
Services Provided Validation	STVSEPR
State F/A Eligibility Validation	STVSFAE
Service Provider Validation	STVSPRV
Disability Service Code Validation	STVSPSR
Sport Status Code Validation	STVSPST

Form Description	Banner Name
Service Code Validation	STVSSER
Service Result Validation	STVSSRS
Services Status Validation	STVSSST
Student Status Code Validation	STVSTST
Student Type Code Validation	STVSTYP
Student Element One (through Ten) Validation	STVSUDA, STVSUDB, STVSUDC,….,STVSUDJ
Acceptance Reason Validation	STVTRAC
Veteran Type Code Validation	STVVETC
Student EOPS/CARE Withdrawal Reason Validation	STVWTHD

Student Activity Code Validation

Purpose

Use the Student Activity Code Validation Form (STVACTC) to create, update, insert, and delete activity codes. This form is used by other forms to validate activity codes (Debate Club, Swim Team, ROTC, etc.). You may only create or update activity codes from this form.

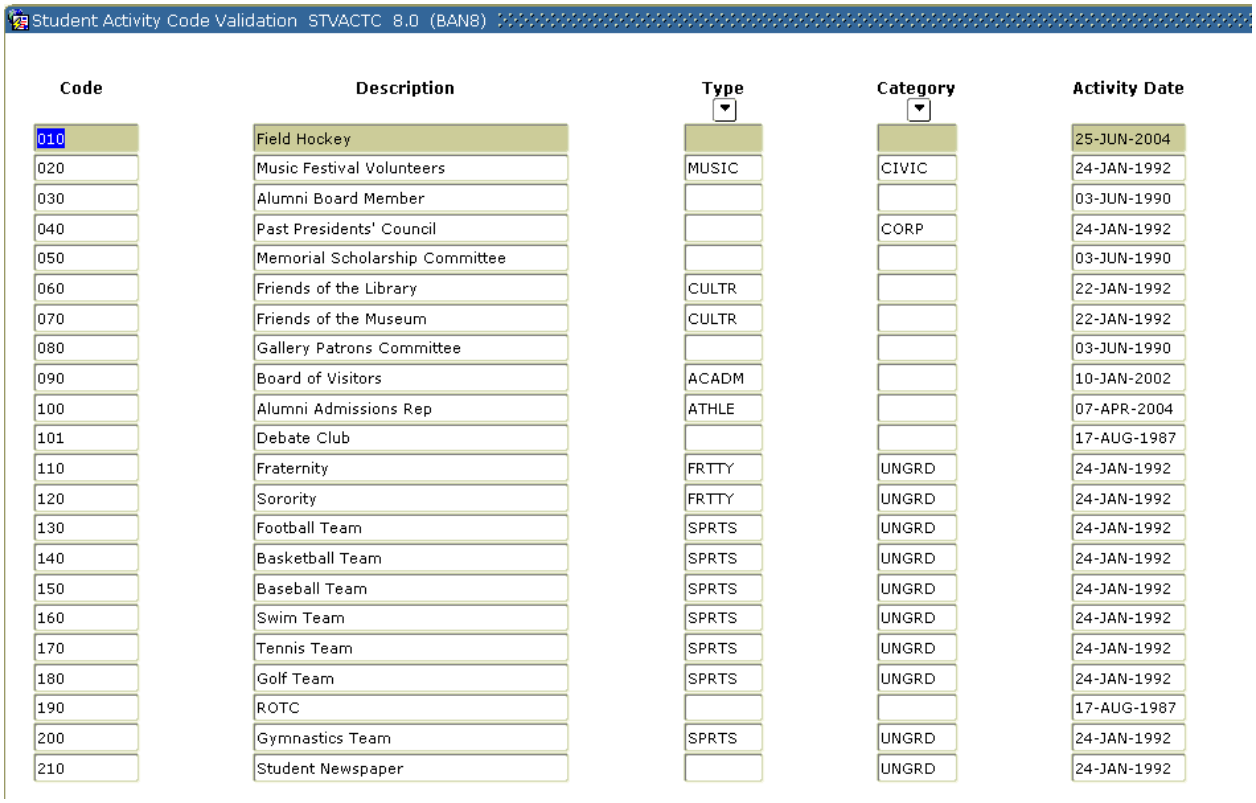
The **Category** field is validated against the Activity Category Validation Form (STVACCG), and the **Type** field is validated against the Activity Type Validation Form (STVACTP).

Notes: All activity codes which are for sports and should be able to be added on the Student Sport Form (SGASPRT) *must* have a type code of SPRTS. This type code is a system-required code on the Activity Type Validation Form (STVACTP).

Use a code of UNASSIGN (in the Type field) for collector table processing with the Print Detail Report Indicator parameter of the Student Right to Know Report (SGRKNOW).

Warning: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



Code	Description	Type	Category	Activity Date
010	Field Hockey			25-JUN-2004
020	Music Festival Volunteers	MUSIC	CIVIC	24-JAN-1992
030	Alumni Board Member			03-JUN-1990
040	Past Presidents' Council		CORP	24-JAN-1992
050	Memorial Scholarship Committee			03-JUN-1990
060	Friends of the Library	CULTR		22-JAN-1992
070	Friends of the Museum	CULTR		22-JAN-1992
080	Gallery Patrons Committee			03-JUN-1990
090	Board of Visitors	ACADM		10-JAN-2002
100	Alumni Admissions Rep	ATHLE		07-APR-2004
101	Debate Club			17-AUG-1987
110	Fraternity	FRTTY	UNGRD	24-JAN-1992
120	Sorority	FRTTY	UNGRD	24-JAN-1992
130	Football Team	SPRTS	UNGRD	24-JAN-1992
140	Basketball Team	SPRTS	UNGRD	24-JAN-1992
150	Baseball Team	SPRTS	UNGRD	24-JAN-1992
160	Swim Team	SPRTS	UNGRD	24-JAN-1992
170	Tennis Team	SPRTS	UNGRD	24-JAN-1992
180	Golf Team	SPRTS	UNGRD	24-JAN-1992
190	ROTC			17-AUG-1987
200	Gymnastics Team	SPRTS	UNGRD	24-JAN-1992
210	Student Newspaper		UNGRD	24-JAN-1992

Steps

Follow these steps to create a student activity code.

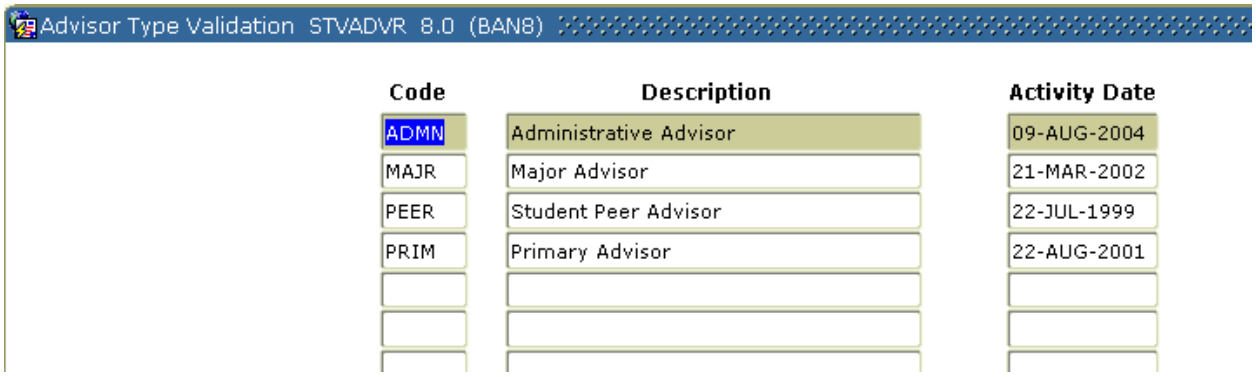
1. Access the Student Activity Code Validation Form (STVACTC).
2. Perform an **Insert Record** function.
3. Enter a three- or four-character activity code in the **Code** field.
4. Enter a description of the code in the **Description** field.
5. Select an activity type in the **Type** field. This field is optional.
6. Select an activity category in the **Category** field. This field is optional.
7. Repeat steps 2 – 6 to enter all student activity codes.
8. Click the **Save** icon.
9. Click the **Exit** icon.

Advisor Type Validation

Purpose

Use the Advisor Type Code Validation Form (STVADVR) to create, update, insert, and delete advisor type codes for students. Students may have multiple advisors, such as an academic advisor or an athletic advisor. You may only create or update advisor type codes from this form.

Banner form



Steps

Follow these steps to create an advisor type code.

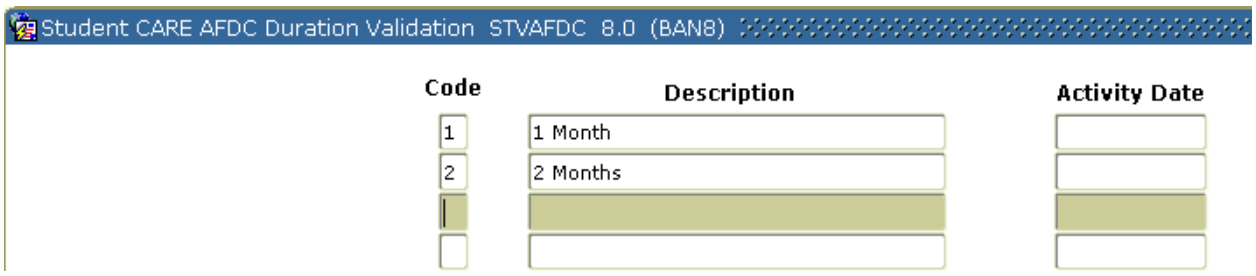
1. Access the Advisor Type Code Validation Form (STVADVR).
2. Enter an advisor type code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student CARE AFDC Duration Validation

Purpose

Use the Student CARE AFDC Duration Validation Form (STVAFDC) to create, update, insert, and delete CARE AFDC codes. These codes indicate the length of time a CARE student has been on Aid to Families with Dependent Children (AFDC), at the time of enrollment for the current term. You can create or update these codes only from this form.

Banner form



Steps

Follow these steps to create a student CARE AFDC duration code.

1. Access the Student CARE AFDC Duration Validation Form (STVAFDC).
2. Enter the code of the CARE AFCD duration in the **Code** field.
3. Enter a description of the CARE AFDC duration in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

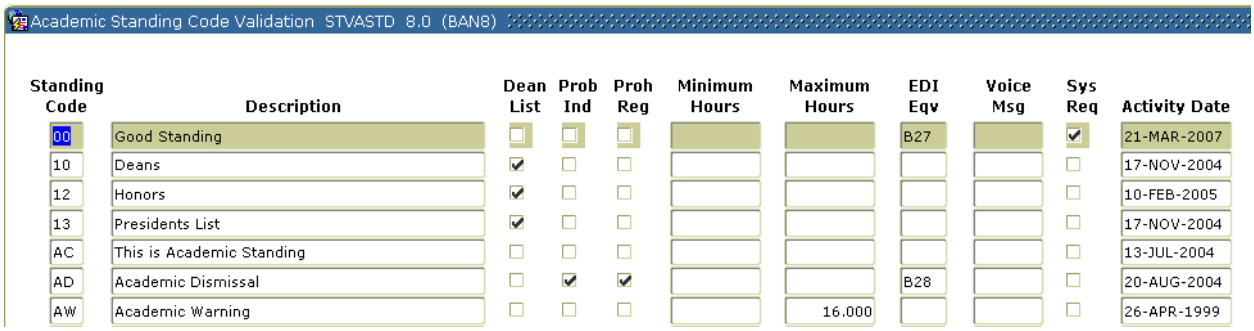
Academic Standing Code Validation

Purpose

Use the Academic Standing Code Validation Form (STVASTD) to create, update, insert, and delete academic standing codes, such as Good Standing, Dean's List, or Suspension. Other forms use this form to validate these codes, which you can only create or update from this form.

Note: Calculated code displays in the General Student record.

Banner form



Standing Code	Description	Dean List	Prob Ind	Proh Reg	Minimum Hours	Maximum Hours	EDI Eqv	Voice Msg	Sys Req	Activity Date
00	Good Standing	☐	☐	☐			B27		☑	21-MAR-2007
10	Deans	☑	☐	☐					☐	17-NOV-2004
12	Honors	☑	☐	☐					☐	10-FEB-2005
13	Presidents List	☑	☐	☐					☐	17-NOV-2004
AC	This is Academic Standing	☐	☐	☐					☐	13-JUL-2004
AD	Academic Dismissal	☐	☑	☑			B28		☐	20-AUG-2004
AW	Academic Warning	☐	☐	☐		16.000			☐	26-APR-1999

Steps

Follow these steps to create an academic standing code.

1. Access the Academic Standing Code Validation Form (STVASTD).
2. Enter a two-character code in the **Standing Code** field.
3. Enter a description of the standing code in the **Description** field.
4. Click the **Dean's List** checkbox if this code indicates the student is on the Dean's List.
5. Click the **Prob Ind** checkbox if this code indicates the student is on academic probation.
6. Click the **Proh Reg** checkbox if this code means that the student is prohibited from registering for additional courses.
7. Enter a number in the **Minimum Hours** field for which a student is required to enroll when under this academic standing code.
8. Enter a number in the **Maximum Hours** field for which a student may enroll when under this academic standing code.
9. Enter a code in the **EDI Eqv** (Equivalent) field.

   Note: The **EDI Eqv** (Equivalent) field is used to assign the EDI SPEEDE/ExPRESS academic standing code values to the institution's academic standing codes. The EDI equivalent value will be used in the transmission of transcript information electronically via EDI. These values are defined in the EDI SPEEDE/ExPRESS Implementation Guide under data element #641.

10. Enter a number in the **Voice Msg** field to assign a number to the recorded message that describes the academic standing code for telephone applications.
11. Do not check the **System Required** checkbox.

    Note: If the **System Required** checkbox is checked, the validation table record cannot be deleted.

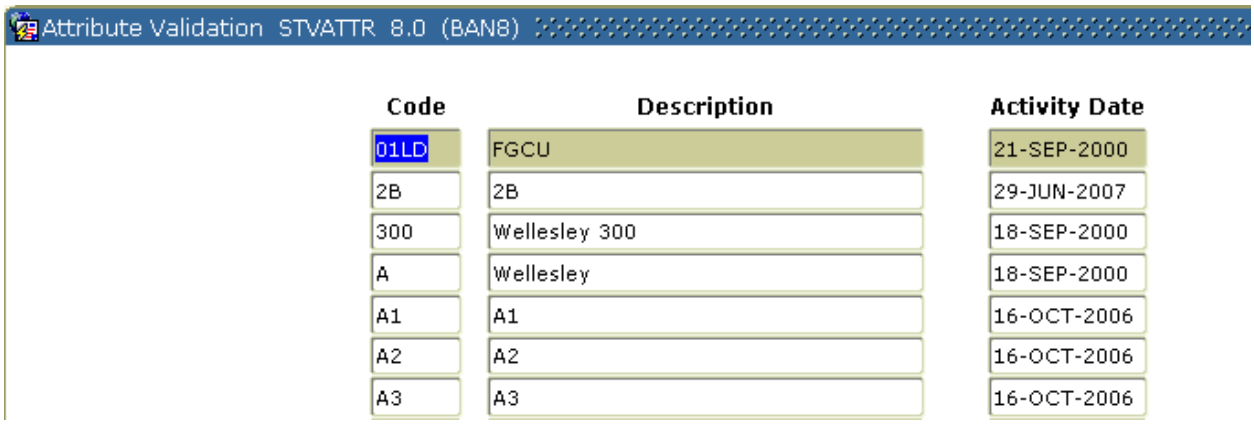
12. Click the **Save** icon.
13. Click the **Exit** icon.

Attribute Validation

Purpose

Use the Attribute Validation Form (STVATTR) to create, update, insert, and delete degree program codes, such as Affiliated Teaching Requirement, Language Requirement, or Writing Intensive Requirement. These attributes are also known as Degree Attributes or Program Attributes in Banner Student. Other forms use this form to validate these codes, which you can create or update only from this form. You need to create an attribute code for Remedial Course Attribute, for use in IPEDS reporting.

Banner form



Steps

Follow these steps to create an attribute validation code.

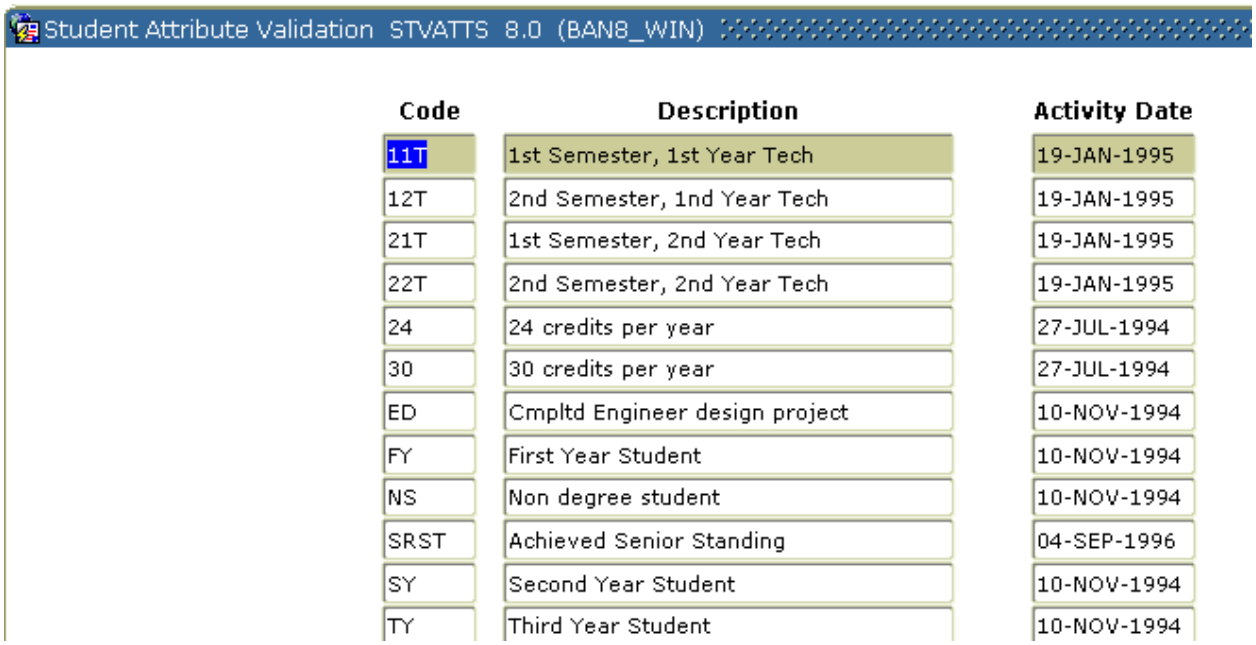
1. Access the Attribute Validation Form (STVATTR).
2. Enter the code of the degree attribute in the **Code** field.
3. Enter a description of the degree attribute in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student Attribute Validation

Purpose

You can use the Student Attribute Code Validation Form (STVATTS) to create, update, insert, and delete student attribute codes such as First Year Student, Achieved Senior Standing, or Non-degree Student. You can only create or update these codes from this form

Banner form



Code	Description	Activity Date
11T	1st Semester, 1st Year Tech	19-JAN-1995
12T	2nd Semester, 1nd Year Tech	19-JAN-1995
21T	1st Semester, 2nd Year Tech	19-JAN-1995
22T	2nd Semester, 2nd Year Tech	19-JAN-1995
24	24 credits per year	27-JUL-1994
30	30 credits per year	27-JUL-1994
ED	Cmpltd Engineer design project	10-NOV-1994
FY	First Year Student	10-NOV-1994
NS	Non degree student	10-NOV-1994
SRST	Achieved Senior Standing	04-SEP-1996
SY	Second Year Student	10-NOV-1994
TY	Third Year Student	10-NOV-1994

Steps

Follow these steps to create a student attribute validation code.

1. Access the Student Attribute Code Validation Form (STVATTS).
2. Enter up to a four-character student attribute code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

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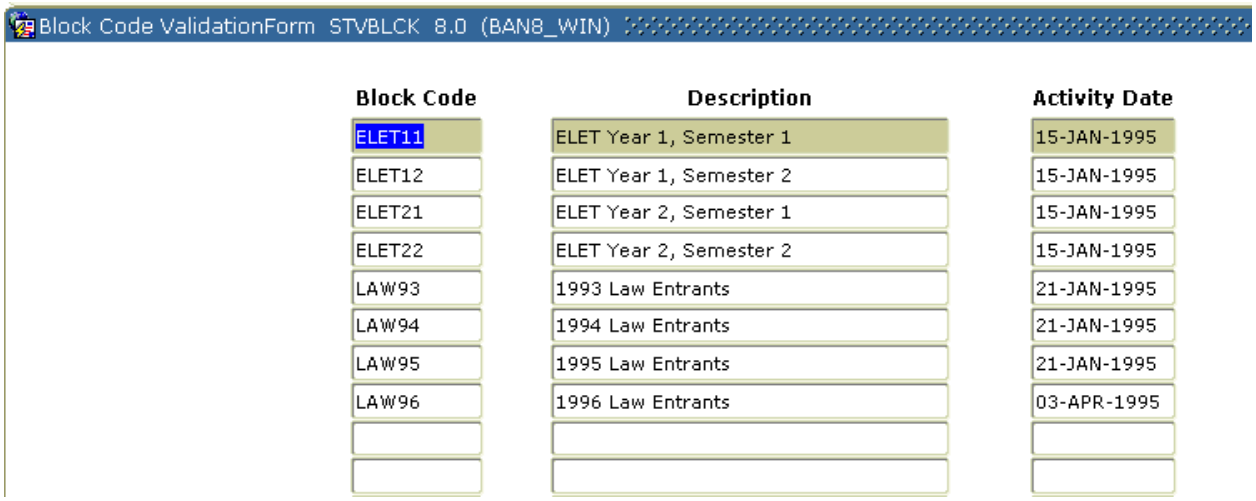
Block Code Validation

Purpose

Use the Block Code Validation Form (STVBLCK) to create, update, insert, and delete block codes which are used in Block Scheduling processing. The block codes represent sets or groupings of sections to which students are assigned in order to be registered more efficiently. You can only create or update these codes from this form.

Banner form



Steps

Follow these steps to create a block code.

1. Access the Block Code Validation Form (STVBLCK).
2. Enter a block code in the Block Code field.
3. Enter a description of the block code in the **Description** field.
4. Repeat steps 2 and 3 until all block codes have been established.
5. Click the **Save** icon.
6. Click the **Exit** icon.

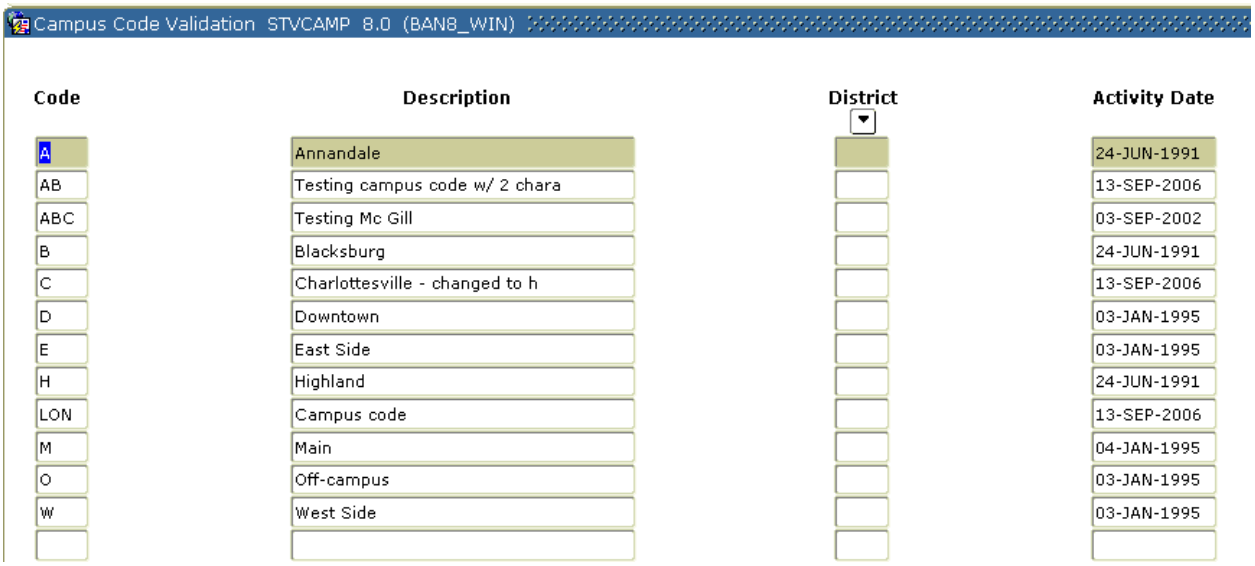
Campus Code Validation

Purpose

Use the Campus Code Validation Form (STVCAMP) to create, update, insert, and delete campus codes, such as Main Campus, Downtown Campus, or Foreign Campus. This form is used by other forms to validate the campus codes. You can create or update these codes only from this form. The **District** field is validated against the District/Division Code Validation Form (GTVDICD).

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



Steps

Follow these steps to create a campus code.

1. Access the Campus Code Validation Form (STVCAMP).
2. Enter campus code in the **Code** field.

   Note: Once a campus code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the campus code record cannot be deleted

3. Enter a description of the campus in the **Description** field.
4. Enter the code of the district or division with which the campus is associated in the **District** field.
5. Click the **Save** icon.
6. Click the **Exit** icon.

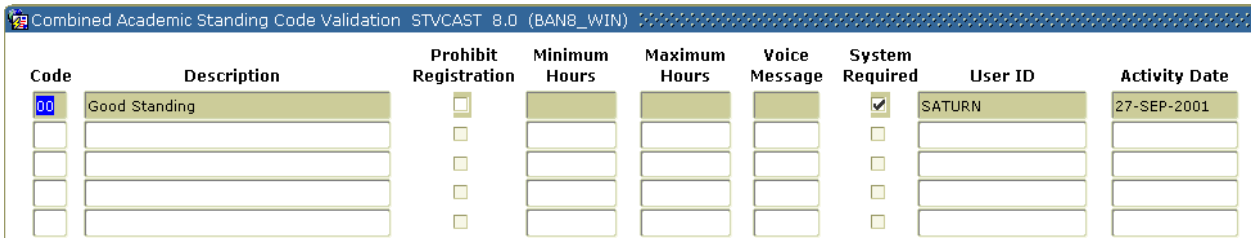
Combined Academic Standing Code Validation

Purpose

The Combined Academic Standing Code Validation Form (STVCAST) is used to create and define valid combined academic standing codes. The combined academic standing code is defined by a combination of an academic standing code and a progress evaluation code.

Note: Calculated code displays in the General Student record.

Banner form



Steps

Follow these steps to create a combined academic standing code.

1. Access the Combined Academic Standing Code Validation Form (STVCAST).
2. Enter a two-digit combined academic standing code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Prohibit Registration** checkbox if this code means that the student is prohibited from registering for additional courses.
5. Enter a number in the **Minimum Hours** field for which a student must enroll when under this academic standing code.
6. Enter a number in the **Maximum Hours** field for which a student may enroll when under this academic standing code.
7. Enter a number in the **Voice Message** field to assign a number to the recorded message that describes the academic standing code for telephone applications.
8. Do not check the **System Required** checkbox.

   Note: If the **System Required** checkbox is checked, the validation table record cannot be deleted.
9. Click the **Save** icon.

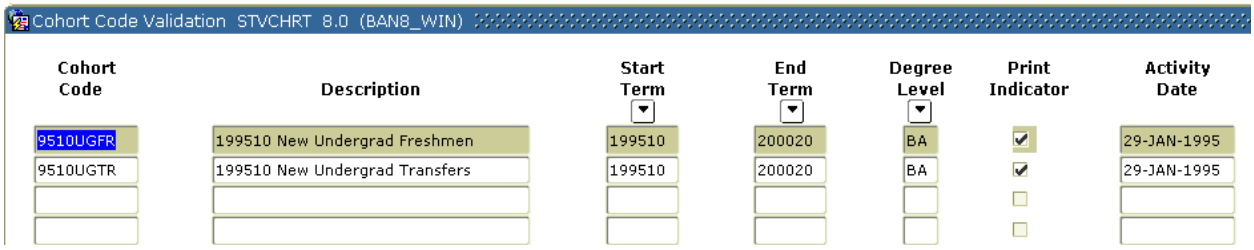
   Result: Banner will fill in the **User ID** and **Activity Date** fields.
10. Click the **Exit** icon.

Cohort Code Validation

Purpose

You can use the Cohort Code Validation Form (STVCHRT) to create, update, insert, and delete cohort codes used in the Recruiting, Admissions, General Student, and Academic History modules. These codes represent a cohort grouping assigned to students based on user-defined criteria. These codes provide a tracking mechanism for Student Right to Know reporting. You may only create or update cohort codes from this form.

Banner form



Steps

Follow these steps to create a cohort code.

1. Access the Cohort Code Validation Form (STVCHRT).
2. Enter a code in the **Cohort Code** field.
3. Enter a description of the code in the **Description** field.
4. Select a term in the **Start Term** field.
5. Select an expected graduation term for this cohort in the **End Term** field.
6. Select the expected degree level for this cohort in the **Degree Level** field. This field is optional.
7. Click the **Print Indicator** checkbox to have data about this cohort included in printed reports.
8. Click the **Save** icon.
9. Click the **Exit** icon.

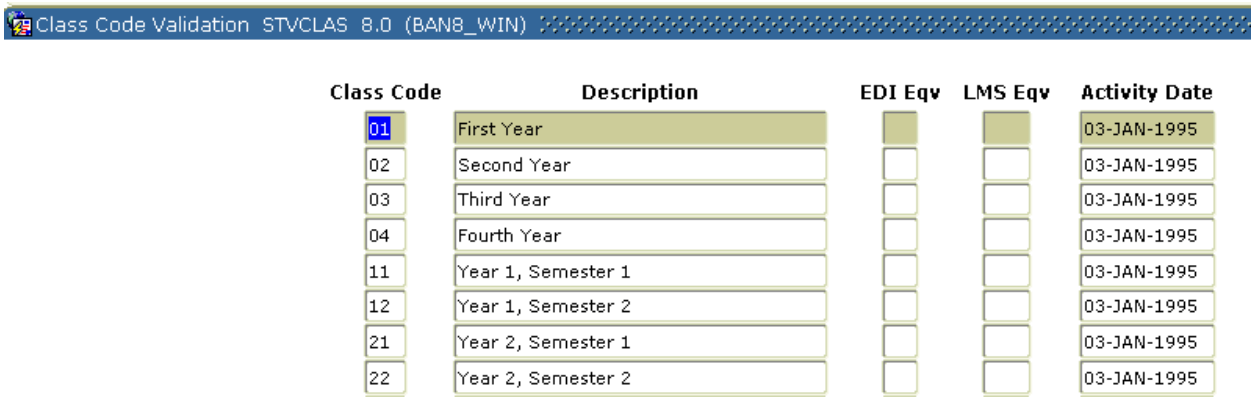
Class Code Validation

Purpose

Use the Class Code Validation Form (STVCLAS) to create, update, insert, and delete class codes.

Examples: Freshmen, Sophomore, First Year Law, Professional, etc.

Banner form



Steps

Follow these steps to create a class code.

1. Access the Class Code Validation Form (STVCLAS).
2. Enter a two-character code in the **Class Code** field.
3. Enter a description of the code in the **Description** field.
4. Enter an EDI equivalent value in the **EDI Eqv** field. This field is optional.

   Note: The **EDI Eqv** (Equivalent) field is used to assign the EDI SPEEDE/ExPRESS class code values to the institution's class codes. The EDI equivalent value will be used in the transmission of transcript information electronically via EDI. These values are defined in the EDI SPEEDE/ExPRESS Implementation Guide under data element #1131

5. Enter an LMS equivalent value in the **LMS Eqv** field. This field is optional.

   Note: The **LMS Eqv** (Equivalent Class Code) field is used to display the IA-PLUS Loan Management System (LMS) class code values that are equivalent to the Banner class codes. These codes are not validated. The translation to these LMS codes occurs during the LMS transaction feed interface from Banner Financial Aid. For more information, please refer to the Financial Aid User Guide or the IA-PLUS Loan Management System User Manual.

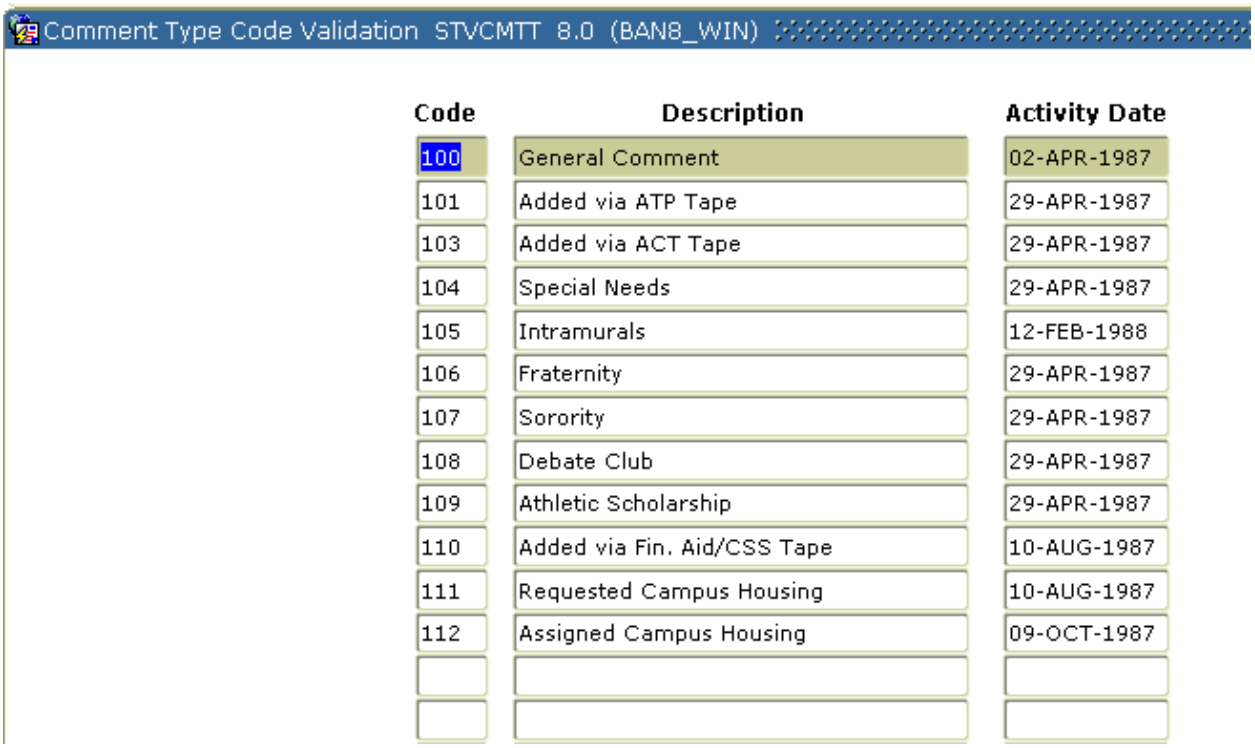
6. Click the **Save** icon.
7. Click the **Exit** icon.

Comment Type Code Validation

Purpose

You can use the Comment Type Code Validation Form (STVCMTT) to create, update, insert, and delete comment types and their respective codes (i.e., General Comment, Special Needs, or Added via ACT Tape). This form is used by other forms to validate the comment types. You can only create or update the comment types from this form.

Banner form



Steps

Follow these steps to create a comment type code.

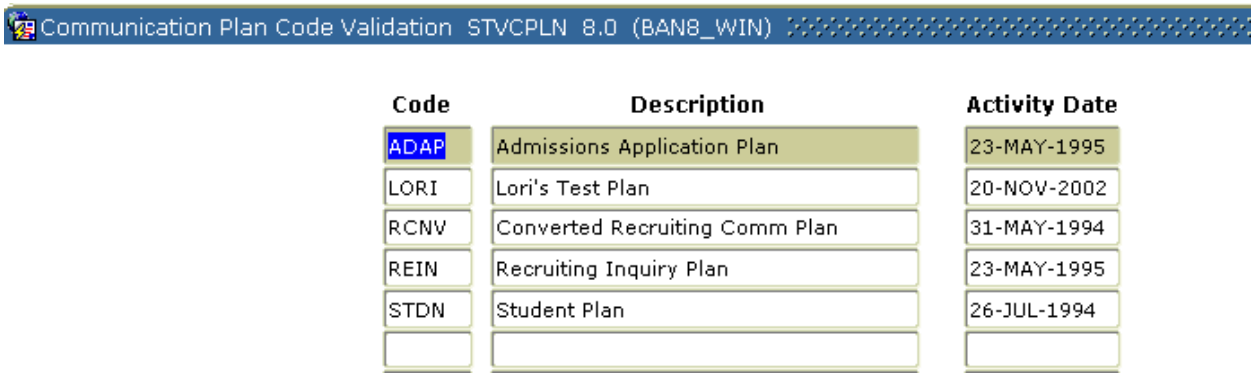
1. Access the Comment Type Code Validation Form (STVCMTT).
2. Enter a three-digit comment type code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Communication Plan Code Validation

Purpose

You can use the Communication Plan Code Validation Form (STVCPLN) to create, update, insert, and delete communication plan codes used in the Recruiting, Admissions, and General Student modules. You may only create or update communication plan codes from this form.

Banner form



Steps

Follow these steps to create a communication plan code.

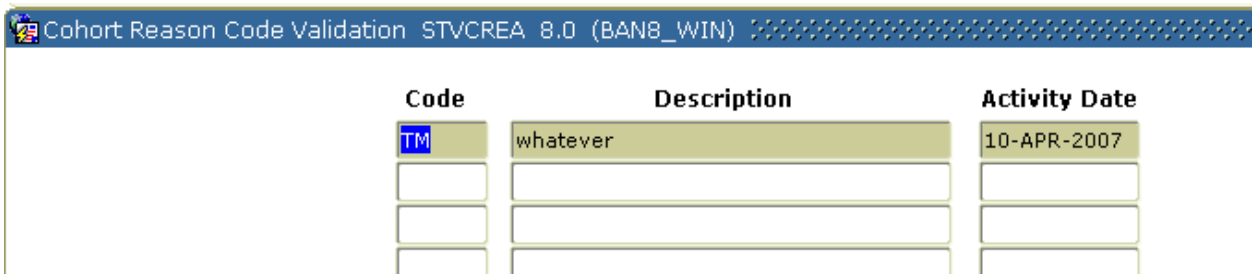
1. Access the Communication Plan Code Validation Form (STVCPLN).
2. Enter a four-character communication plan code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Cohort Reason Code Validation

Purpose

Use the Cohort Reason Code Validation Form (STVCREA) to create, update, insert, and delete cohort reason codes such as Peace Corps, Church Mission, Military Assignment. These codes are used in conjunction with an inactivation of a cohort for a student to identify the reason for the inactivation. You may only create or update cohort reason codes from this form.

Banner form



Steps

Follow these steps to create a cohort reason code.

1. Access the Cohort Reason Code Validation Form (STVCREA).
2. Enter a four-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Repeat steps 2 and 3 until all cohort reasons are entered.
5. Click the **Save** icon.
6. Click the **Exit** icon.

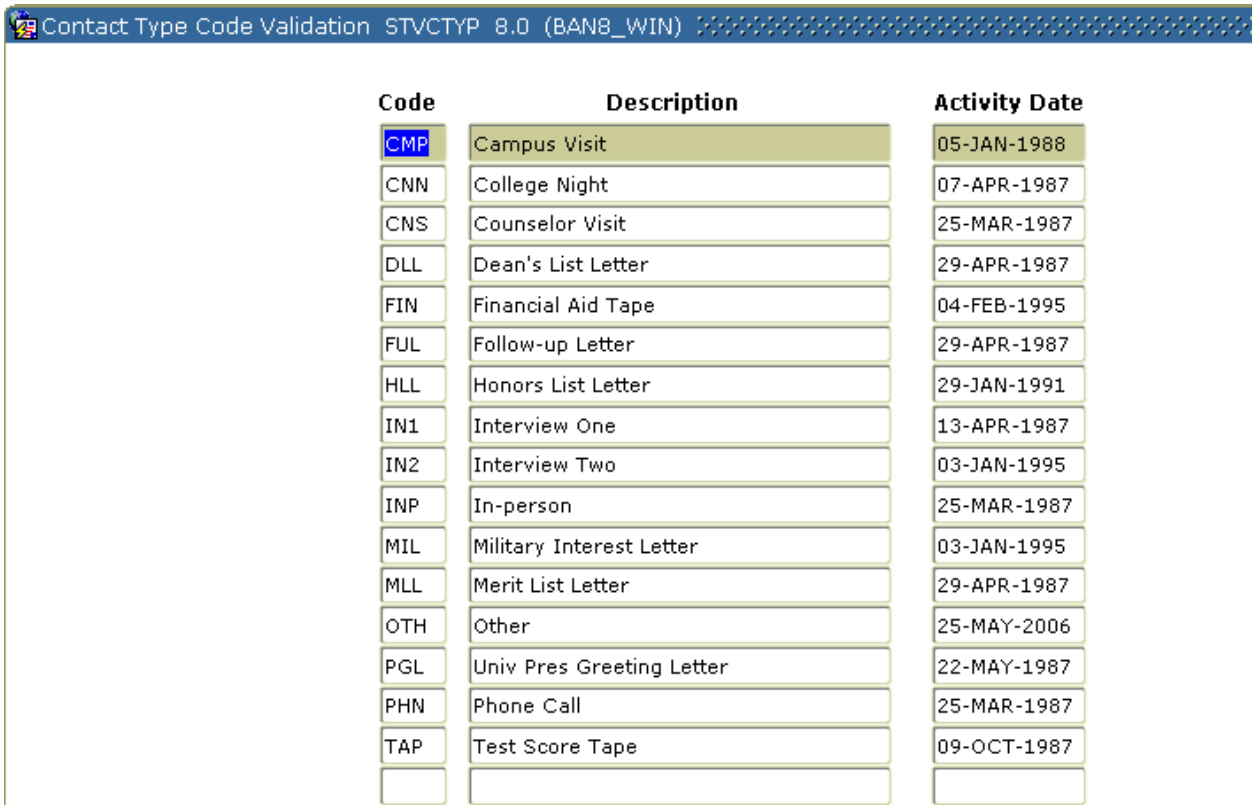
Contact Type Code Validation

Purpose

Use the Contact Type Code Validation Form (STVCTYP) to create, update, insert, and delete recruiting contact type codes (i.e., Campus Visit, College Night, or Merit List Letter, etc.).

Note: Several forms in the Recruiting module and the Interface Validation Form (STVINFC) use this form to validate recruiting contact type codes. You may only create or update these codes from this form.

Banner form



Steps

Follow these steps to create a contact type code.

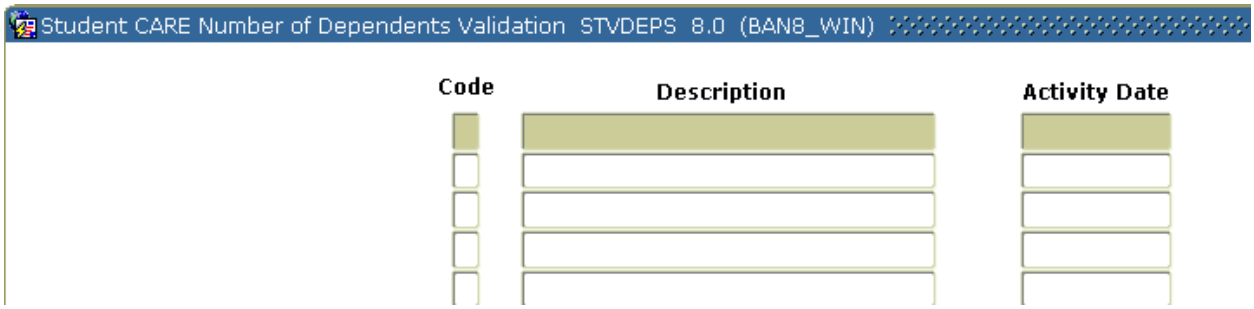
1. Access the Contact Type Code Validation Form (STVCTYP).
2. Enter a three-character contact type code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student CARE Number of Dependents Validation

Purpose

Use the Student CARE Number of Dependents Validation Form (STVDEPS) to create, update, insert, and delete codes which indicate a CARE student's number of dependent children. You can create or update these codes only from this form.

Banner form



Steps

Follow these steps to create a Student CARE Number of Dependents code.

1. Access the Student CARE Number of Dependents Validation Form (STVDEPS).
2. Enter a one-character code of the dependent-children number in the **Code** field.

   Note: Once a dependent-children number code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the dependent-children number code record cannot be deleted.
3. Enter a description of the dependent-children number in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

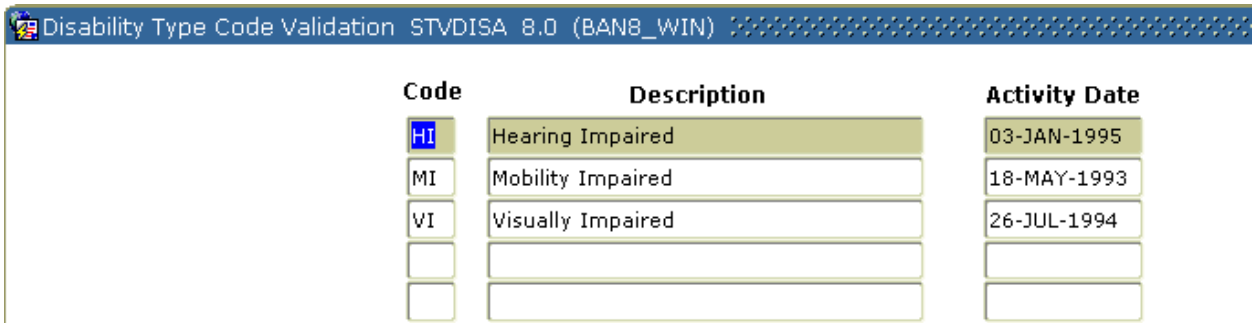
Disability Type Code Validation

Purpose

Use the Disability Type Code Validation Form (STVDISA) to create, update, insert, and delete disability codes, such as Blind, Multiple Sclerosis, Hearing Impaired, and so forth. You can create or update these codes only from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



Steps

Follow these steps to create a disability code.

1. Access the Disability Code Validation Form (STVDISA).
2. Enter a two-character code in the **Code** field.

   Note: Once a disability type code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the disability type code record cannot be deleted.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

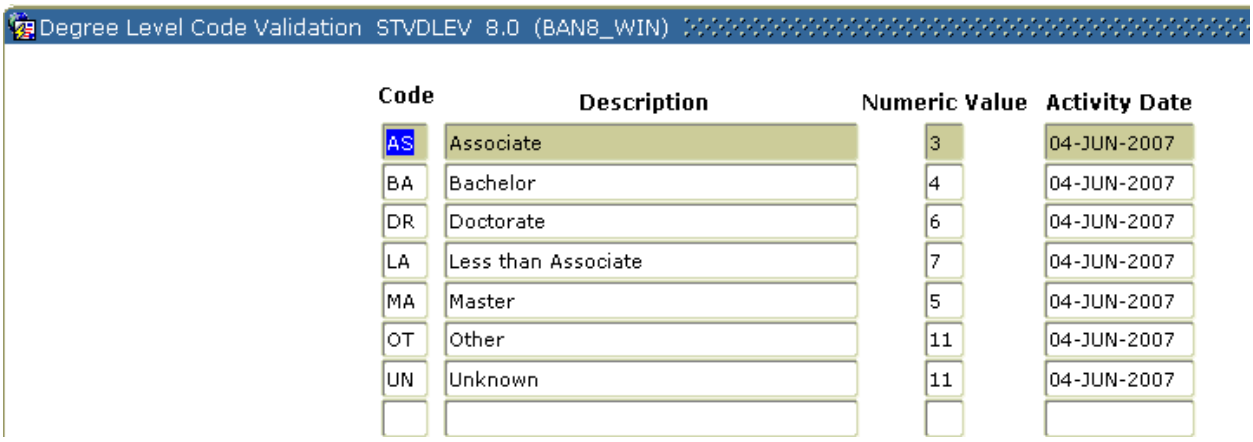
Degree Level Code Validation

Purpose

Use the Degree Level Code Validation Form (STVDLEV) to create, update, insert, and delete degree level codes (Associate, Bachelor, Master, etc.). Other forms use this form to validate the degree level codes. You may only create or update degree level codes from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



Steps

Follow these steps to create a degree level code.

1. Access the Degree Level Code Validation Form (STVDLEV).
2. Enter a two-character degree level code in the **Code** field.
3. Enter a description in the **Description** field.
4. Enter a number in the **Numeric Value** field.

   Note: The **Numeric Value** field is used to determine a ranking value for the degree level, which is used in the Cohorts and Student Right to Know tracking processes. The numeric value should be established with the lowest degree level having the lowest value and the highest degree level having the highest value.

5. Repeat steps 2-4 to add more degree codes.
6. Click the **Save** icon.
7. Click the **Exit** icon.

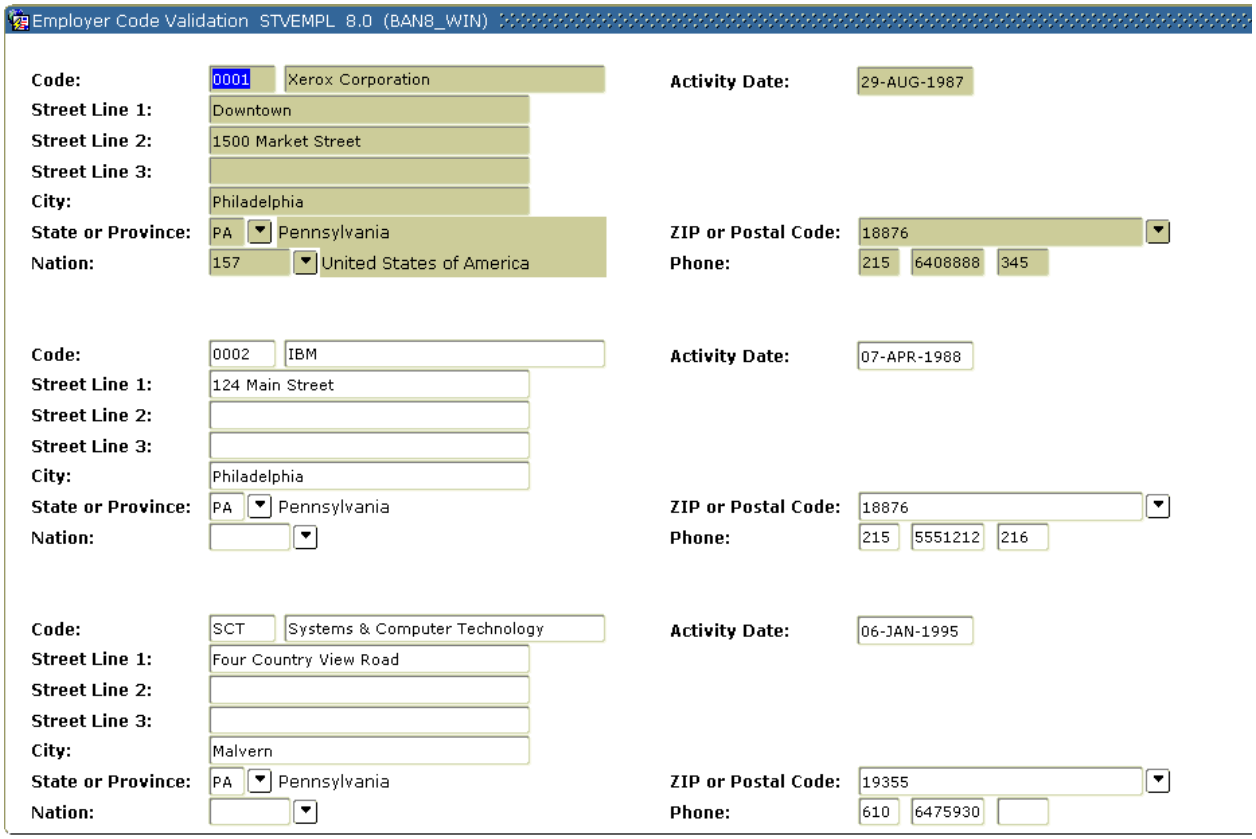
Employer Code Validation

Purpose

Use the Employer Code Validation Form (STVEMPL) to maintain employer codes which represent the employer's name, address, and phone number. Other forms use this form to validate this employer information. You may only create or update these codes from this form.

Note: When a valid ZIP or postal code is selected from the ZIP/Postal Code Validation Form (GTVZIPC) and entered in the ZIP/PC field, the combination of City, State/Province, and Nation information which exists in GTVZIPC will default into the appropriate fields. The related information does not default in when the ZIP/Postal Code is entered manually.

Banner form



Steps

Follow these steps to create an employer code.

1. Access the Employer Code Validation Form (STVEMPL).
2. Perform an **Insert Record** function.
3. Enter up to a four-character employer code in the **Code** field.
4. Enter the employer name in the un-named field.
5. Enter the street address in the **Street Line 1** field.
6. Enter the city in the **City** field.
7. Select the state or province code in the **State or Province** field.
8. Enter *157* in the **Nation** field for the United States of America.
9. Select a zip or postal code in the **Zip or Postal Code** field.
10. Enter a phone number in the **Phone** field.
11. Click the **Save** icon.
12. Click the **Exit** icon.

Eligibility Validation

Purpose

You can use the Eligibility Code Validation Form (STVELIG) to create, update, insert, and delete eligibility codes. These codes are used in Student Right to Know tracking by the Student Sport Form (SGASPRT) in the General Student module. You may only create or update these codes from this form.

Banner form

Steps

Follow these steps to create an eligibility code.

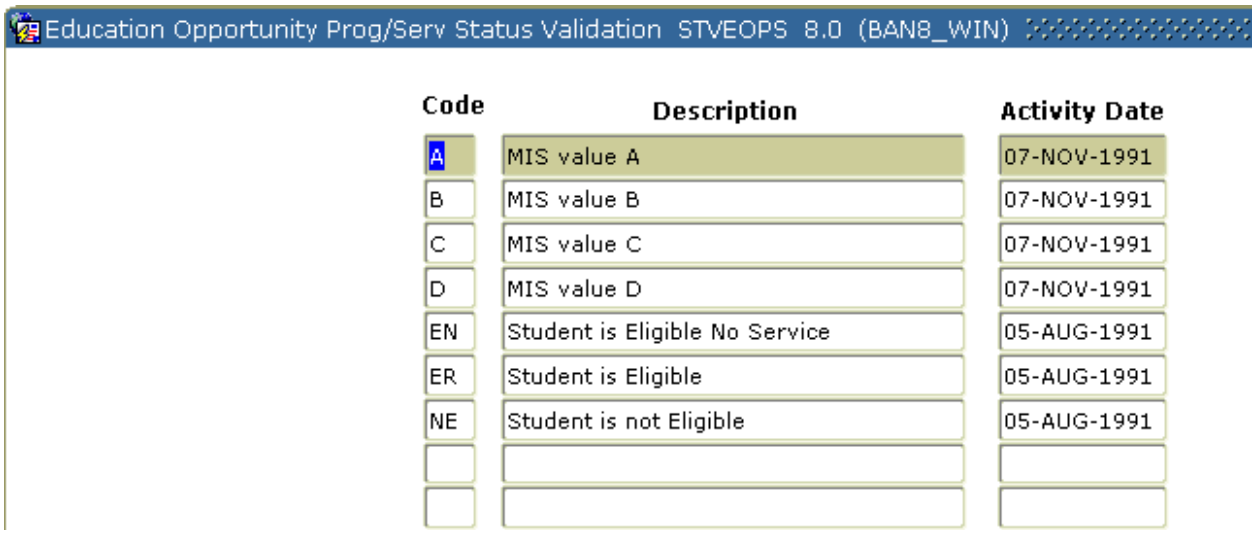
1. Access the Eligibility Validation Form (STVELIG).
2. Enter a two-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Education Opportunity Prog/Serv Status Validation

Purpose

Use the Education Opportunity Prog/Serv Status Validation Form (STVEOPS) to create, update, insert, and delete EOPS (Educational Opportunity Programs and Services) status codes, such as No Service, Student is Eligible, or Student is Not Eligible. This form is used by the Educational Opportunity Programs and Services Form (SGAEOPS) to validate the EOPS status codes. You can create or update these type codes only from this form.

Banner form



Steps

Follow these steps to create an EOPS (Educational Opportunity Programs and Services) status code.

1. Access the Education Opportunity Prog/Serv Status Validation Form (STVEOPS).

2. Enter a two-character code of the EOPS status in the **Code** field.

   Note: Once an EOPS status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the EOPS status code record cannot be deleted.

3. Enter a description of the EOPS status in the **Description** field.

4. Click the **Save** icon.

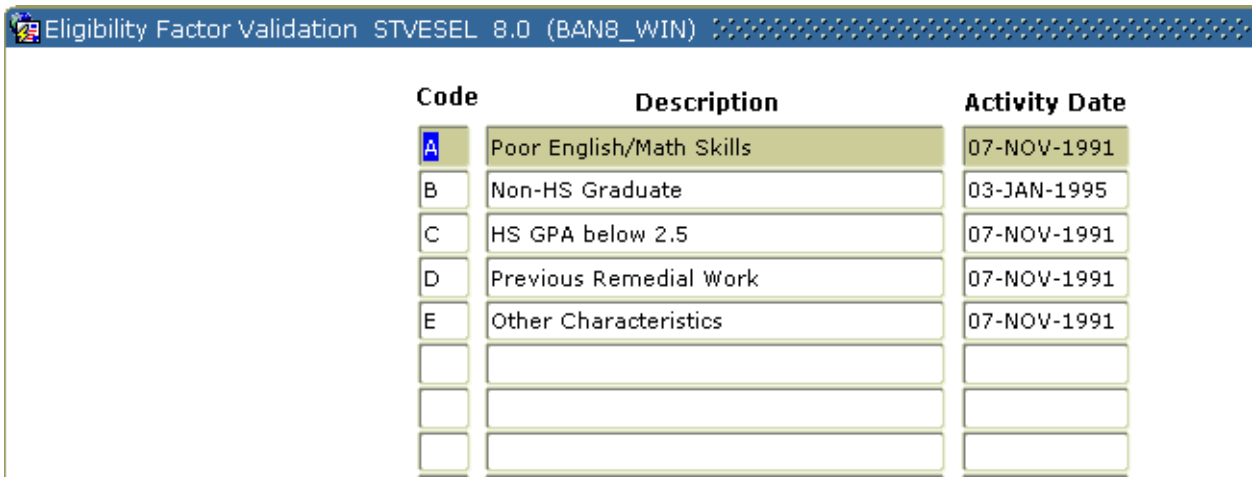
5. Click the **Exit** icon.

Eligibility Factor Validation

Purpose

Use the Eligibility Factor Validation Form (STVESEL) to create, update, insert, and delete eligibility factor codes, such as: Did not graduate HS NO GED; Financial Consideration; H.S. GPA below 2.5; and so on. The Education Opportunity Programs and Services Form (SGAEOPS) uses this form to validate eligibility factors. You can create or update these codes only from this form.

Banner form



Steps

Follow these steps to create an eligibility factor code.

1. Access the Eligibility Factor Validation Form (STVESEL).

2. Enter a two-character code for the eligibility factor in the **Code** field.

   Note: Once an eligibility factor code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the eligibility factor code record cannot be deleted.

3. Enter a description of the eligibility factor in the **Description** field.

4. Click the **Save** icon.

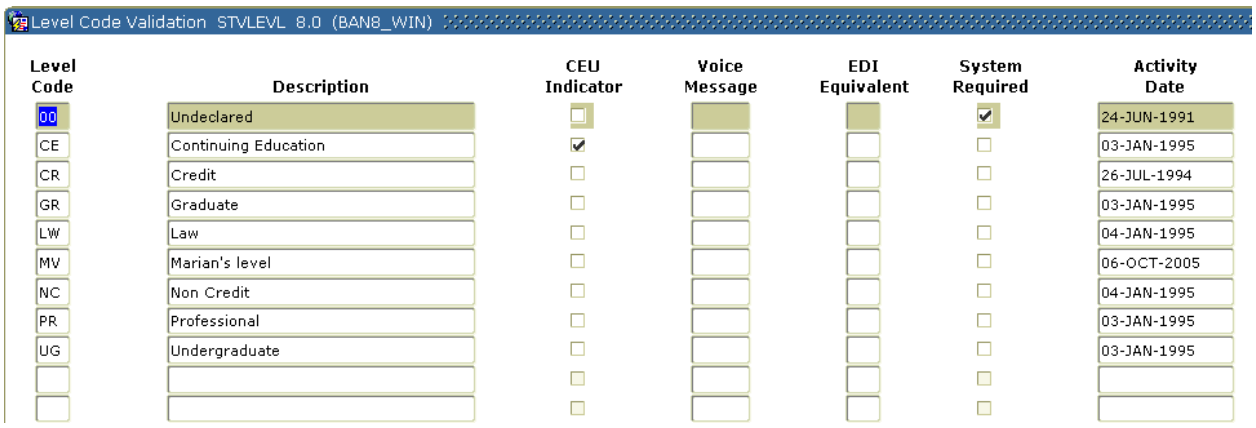
5. Click the **Exit** icon.

Level Code Validation

Purpose

Use the Level Code Validation Form (STVLEVL) to create, update, insert, and delete level codes, such as No Level Declared, Undergraduate, Non-Matriculated Graduate, and so on. Several forms in various modules use this form to validate the level codes. You can create and update these codes only from this form.

Banner form



Steps

Follow these steps to create a level code.

1. Access the Level Code Validation Form (STVLEVL).
2. Enter a two-character code of the level in the **Code** field.

   Note: Once a level code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the level code record cannot be deleted.

3. Enter a description of the level in the **Description** field.
4. Click the **CEU Ind (**Continuing Education Indicator) checkbox if the level is a CEU level.
5. Enter a voice response message number, if appropriate, in the **Voice Msg** field.
6. Enter an EDI equivalent in the **EDI Equiv** field, if appropriate.

   Note: This field is used to assign the EDI SPEEDE/ExPRESS level code values to an institution's level codes for the level of coursework which is reflected in the GPA and hours. When an institutional code is not equated with an EDI code, this field should be blank. The EDI equivalent value is used in the transmission of transcript information electronically via EDI.

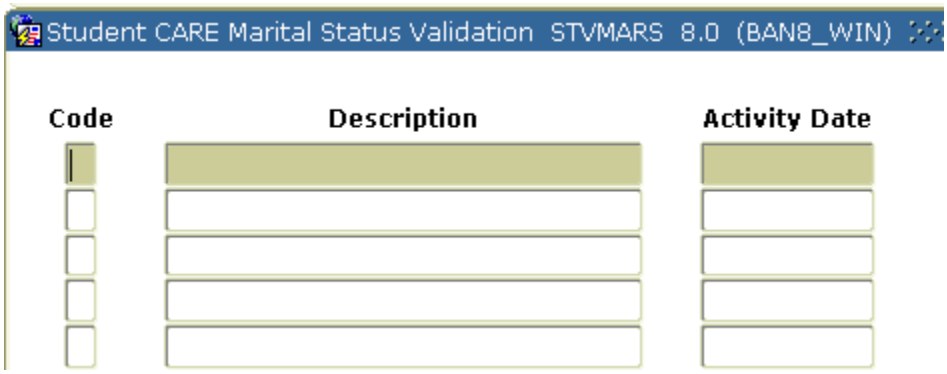
7. Click the **Save** icon.
8. Click the **Exit** icon.

Student CARE Marital Status Validation

Purpose

Use the Student CARE Marital Status Validation Form (STVMARS) to create, update, insert, and delete codes which indicate the marital status of a CARE student. You can create and update these codes only from this form.

Banner form



Steps

Follow these steps to create a student CARE marital status code.

1. Access the Student CARE Marital Status Validation Form (STVMARS).
2. Enter a one-character code of the marital status in the **Code** field.

   Note: Once a marital status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the marital status code record cannot be deleted.

3. Enter a description of the marital status in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

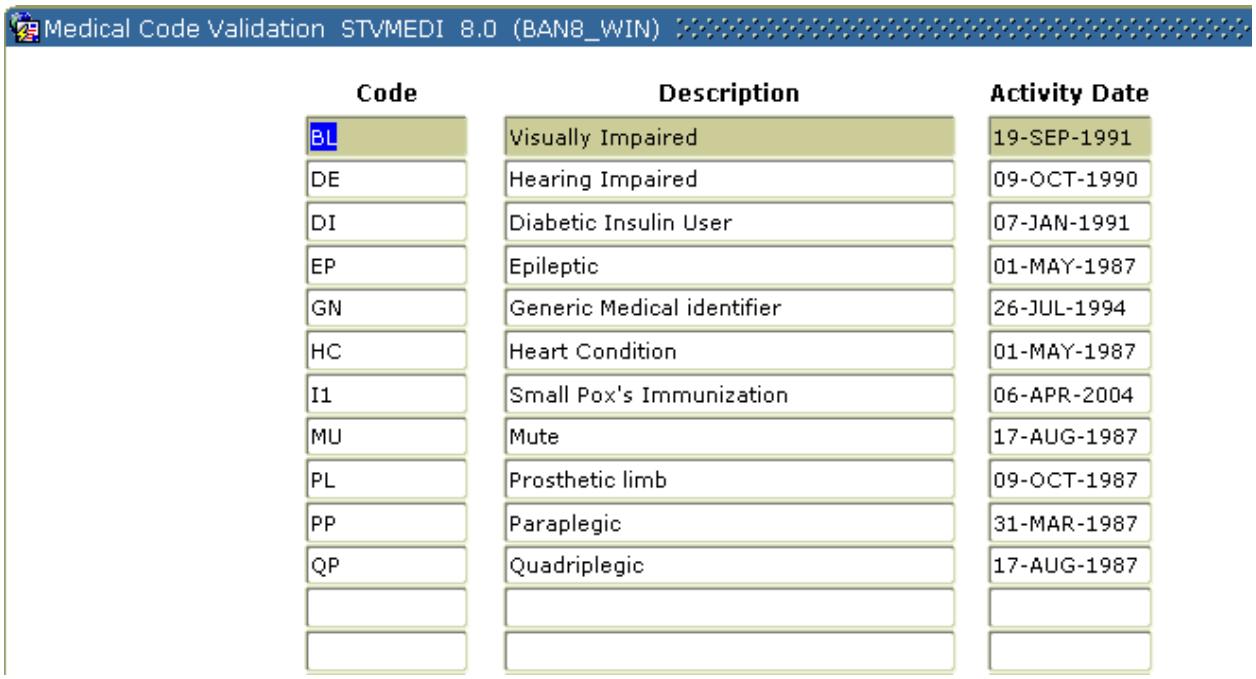
Medical Code Validation

Purpose

Use the Medical Code Validation Form (STVMEDI) to create, update, insert, and delete medical codes, such as Blind, Deaf, Prosthetic Limb, and so on. The Medical Information Form (GOAMEDI) uses this form to validate the medical codes. You can create and update these codes only from this form.

Note: All Banner systems share this validation form. You should coordinate with other Banner system users at your institution when deciding what codes are used on this form.

Banner form



Code	Description	Activity Date
BL	Visually Impaired	19-SEP-1991
DE	Hearing Impaired	09-OCT-1990
DI	Diabetic Insulin User	07-JAN-1991
EP	Epileptic	01-MAY-1987
GN	Generic Medical identifier	26-JUL-1994
HC	Heart Condition	01-MAY-1987
I1	Small Pox's Immunization	06-APR-2004
MU	Mute	17-AUG-1987
PL	Prosthetic limb	09-OCT-1987
PP	Paraplegic	31-MAR-1987
QP	Quadriplegic	17-AUG-1987

Steps

Follow these steps to create a medical code.

1. Access the Medical Code Validation Form (STVMEDI).
2. Enter up to ten-characters for the code of the type of disability in the **Code** field.

   Note: Once a medical code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the medical code record cannot be deleted.

3. Enter a description of the type of disability in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Originator Code Validation

Purpose

Use the Originator Code Validation Form (STVORIG) to create, update, insert, and delete originator codes, such as Student Accounts Office, Bursar's Office, Dean of Students, and so on. Forms in several modules use this form to validate the originator codes. You can create and update these codes only from this form.

Note: The value *AUTO,* for *Generated Automatically,* is a required value on this form when CAPP processing is in use.

Banner form

Code	Description	Activity Date
ACCT	Student Accounts Office	26-MAR-1987
ADMS	Admissions Office	26-MAR-1987
ALDR	Director of Alumni Relations	05-JUN-1990
ANFD	Annual Fund Office	03-JUN-1990
AUTO	Generated Automatically	31-MAR-1988
BUSO	Bursar's Office	09-OCT-1987
CCON	Capital Consultant	03-JUN-1990
CORG	Corporate Giving Office	03-JUN-1990
COUN	Counseling Center	01-MAY-1987
DEVD	Director of Development	05-JUN-1990
DOFI	Dean of Instruction	01-MAY-1987
DOFS	Dean of Students	01-MAY-1987
FAID	Financial Aid Office	01-NOV-1989
FINO	Finance and Billing	03-MAR-1992
LIBR	Library Circulation Area	12-MAR-1987
LOAN	Student Loans Office	23-MAY-2007
MAJG	Major Gifts Office	03-JUN-1990
MATH	Department of Mathematics	12-MAR-1987
PHY1	Physical Education - Football	12-MAR-1987
PHY2	Physical Education - Baseball	12-MAR-1987
PLAN	Planned Giving Office	03-JUN-1990
RECR	Recruiting Center	01-MAY-1987
REGS	Registration Office	26-MAR-1987

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Steps

Follow these steps to create an originator code.

1. Access the Originator Code Validation Form (STVORIG).
2. Enter a four-character code of the originator in the **Code** field.

   Note: Once an originator code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the originator code record cannot be deleted.

3. Enter a description of the originator in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

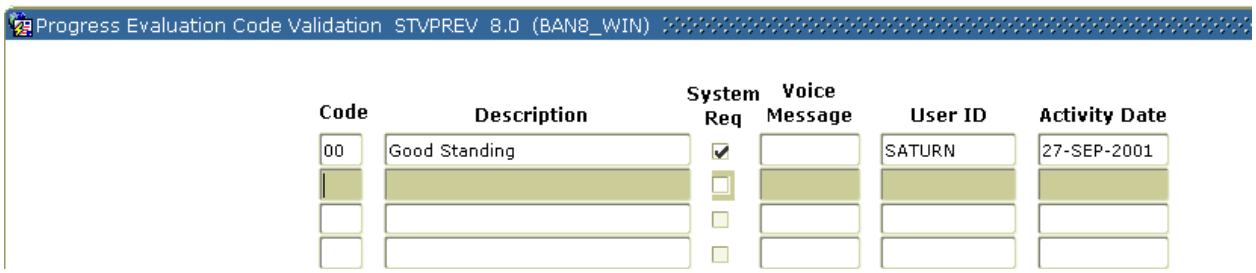
Progress Evaluation Code Validation

Purpose

Use the Progress Evaluation Code Validation Form (STVPREV) to create and define valid progress evaluation codes.

Note: Calculated code displays in the General Student record.

Banner form



Steps

Follow these steps to create a progress evaluation code.

1. Access the Progress Evaluation Code Validation Form (STVPREV).
2. Enter a two-character progress evaluation code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Enter a number in the **Voice Message** field to assign a number to the recorded message that describes the academic standing code for telephone applications.
5. Click the **Save** icon.

   Result: Banner will fill in the **User ID** and **Activity Date** fields.
6. Click the **Exit** icon.

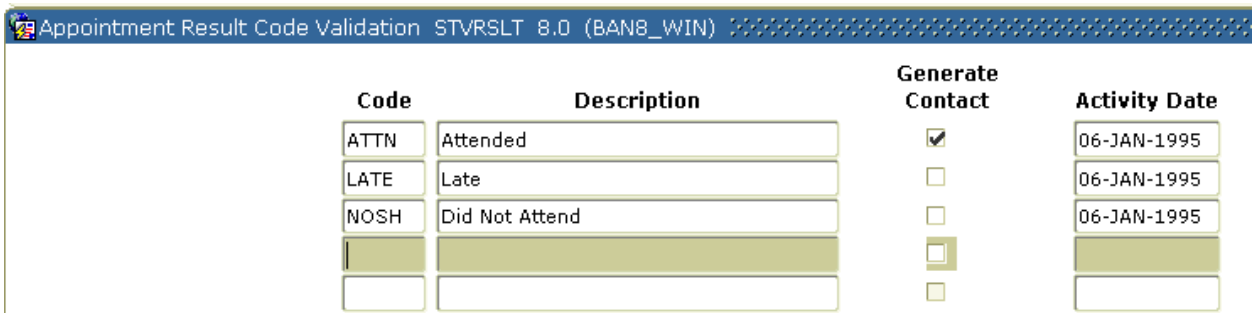
Appointment Result Code Validation

Purpose

Use the Appointment Result Code Validation Form (STVRSLT) to create, update, insert, and delete appointment result codes such as Attended Interview, Did Not Attend Interview, Late to Interview.

Note: The Prospect Information Form (SRARECR) and the Person Appointments/Contacts Form (SOAAPPT) use this form to validate the recruiting appointment result codes. You can only create and update these codes from this form.

Banner form



Steps

Follow these steps to create an appointment result code.

1. Access the Appointment Result Code Validation Form (STVRSLT).
2. Enter a four-character appointment result code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Generate Contact** checkbox to generate follow-up contact material.
5. Click the **Save** icon.
6. Click the **Exit** icon.

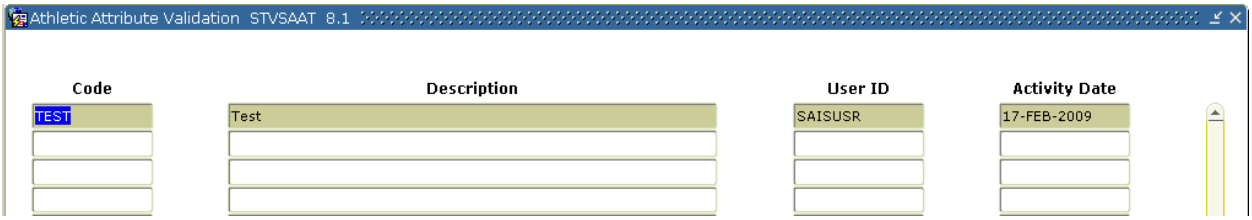
Athlete Attribute Validation

Purpose

Use the Athlete Attribute Validation Form (STVSAAT) to create, update, insert, and delete athlete attribute codes.

Note: The Athlete Compliance Form (SGASPRT) and the Mass Entry Athletic Compliance Form (SGAMSPT) use this form to validate athletic attribute codes. You can only create and update these codes from this form.

Banner form



Steps

Follow these steps to create an athlete attribute code.

1. Access the Athletic Attribute Validation Form (STVSAAT).
2. Enter a four-character attribute code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

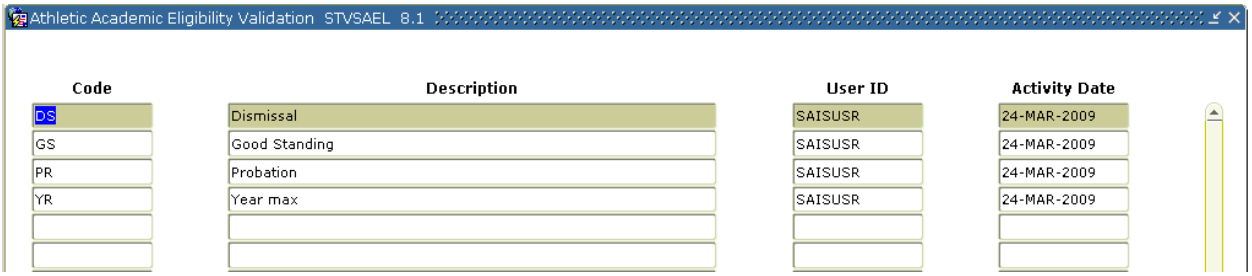
Athletic Academic Eligibility Validation

Purpose

Use the Athletic Academic Eligibility Validation Form (STVSAET) to create, update, insert, and delete athletic academic eligibility codes.

Note: The Athlete Compliance Form (SGASPRT) and the Mass Entry Athletic Compliance Form (SGAMSPT) use this form to validate athletic attribute codes. You can only create and update these codes from this form.

Banner form



Steps

Follow these steps to create an athletic academic eligibility code.

1. Access the Athletic Academic Eligibility Validation Form (STVSAEL).
2. Enter a two-character athletic academic eligibility code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

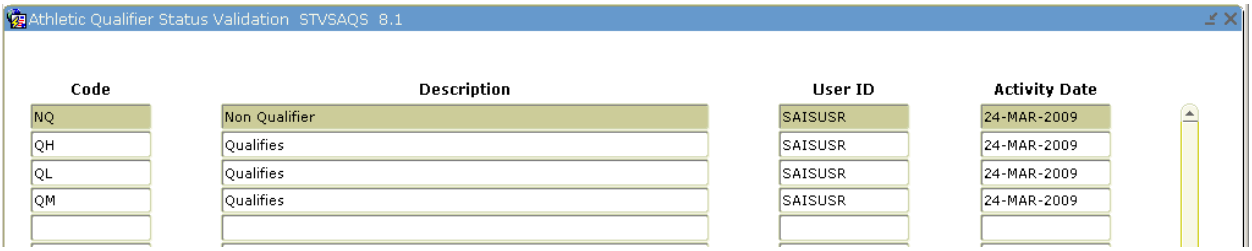
Athletic Qualifier Status Validation

Purpose

Use the Athletic Qualifier Status Validation Form (STVSAQS) to create, update, insert, and delete athletic qualifier status codes.

Note: The Athletic Compliance Form (SGASPRT) use this form to validate athletic qualifier status codes. You can only create and update these codes from this form.

Banner form



Steps

Follow these steps to create an athletic qualifier status code.

1. Access the Athletic Qualifier Status Validation Form (STVSAQS).
2. Enter a two-character athletic qualifier status code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

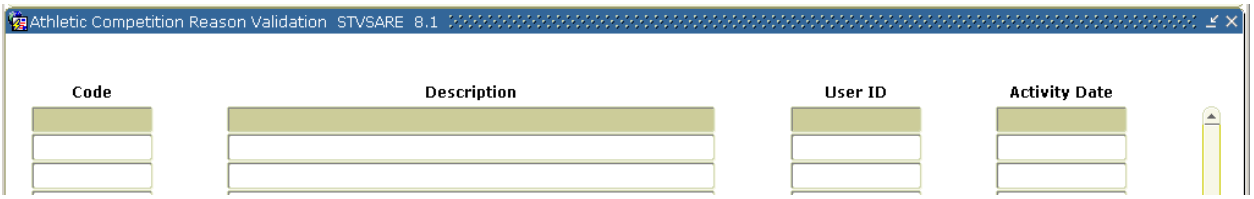
Athletic Competition Reason Validation

Purpose

Use the Athletic Competition Reason Validation Form (STVSARE) to create, update, insert, and delete athletic attribute codes.

Note: The Athlete Compliance Form (SGASPRT) use this form to validate athletic competition reason codes. You can only create and update these codes from this form.

Banner form



Steps

Follow these steps to create an athletic competition reason code.

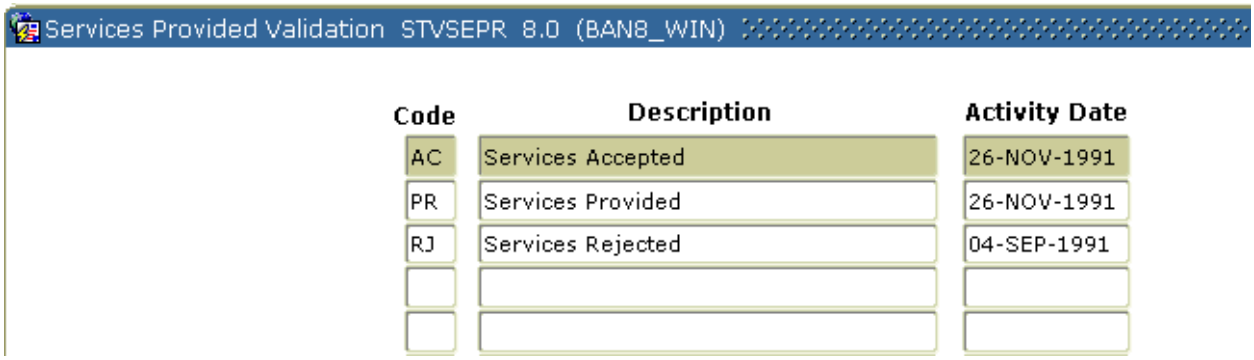
1. Access the Athletic Competition Reason Validation Form (STVSARE).
2. Enter a four-character athletic competition reason code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Services Provided Validation

Purpose

Use the Services Provided Validation Form (STVSEPR) to create, update, insert, and delete support services provided codes, such as *Services Accepted*, *Services Provided*, or *Services Rejected*. The Support Services module uses this form to validate the support services provided codes. You can create and update these codes only from this form.

Banner form



Steps

Follow these steps to create a services provided code.

1. Access the Services Provided Validation Form (STVSEPR).
2. Enter a two-character code of the support service in the **Code** field.

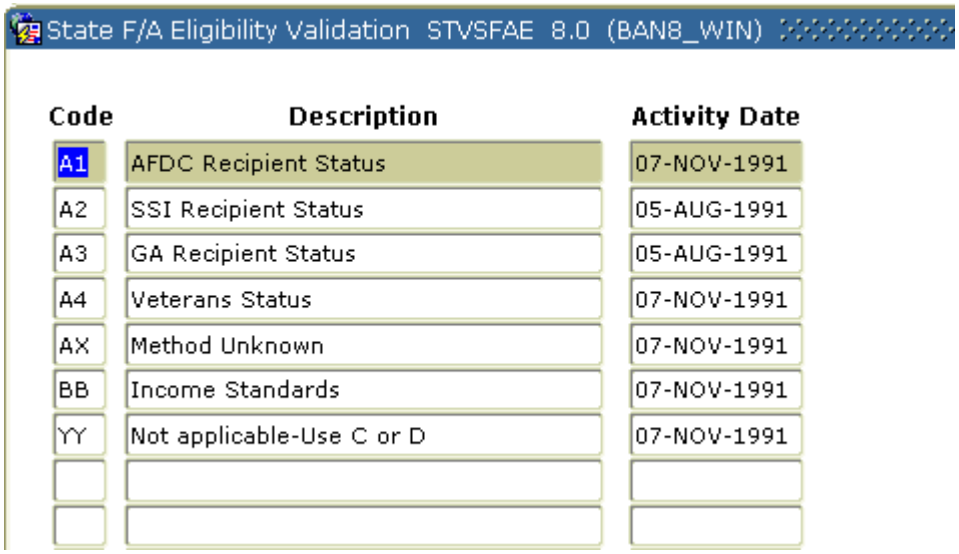
   Note: Once a support service code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the support service code record cannot be deleted.
3. Enter a description of the support service in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

State F/A Eligibility Validation

Purpose

Use the State F/A Eligibility Validation Form (STVSFAE) to create, update, insert, and delete State F/A Eligibility codes. These codes, which describe the manner in which a student was accepted into the EOPS (Educational Opportunity Programs and Services) program, are used by the Educational Opportunity Programs and Services Form (SGAEOPS) for validation. You can create or update these codes only from this form.

Banner form



Steps

Follow these steps to create a State F/A Eligibility code.

1. Access the State F/A Eligibility Validation Form (STVSFAE).
2. Enter a two-character State F/A Eligibility Code in the **Code** field.

   Note: Once a State F/A Eligibility code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the State F/A Eligibility code record cannot be deleted.

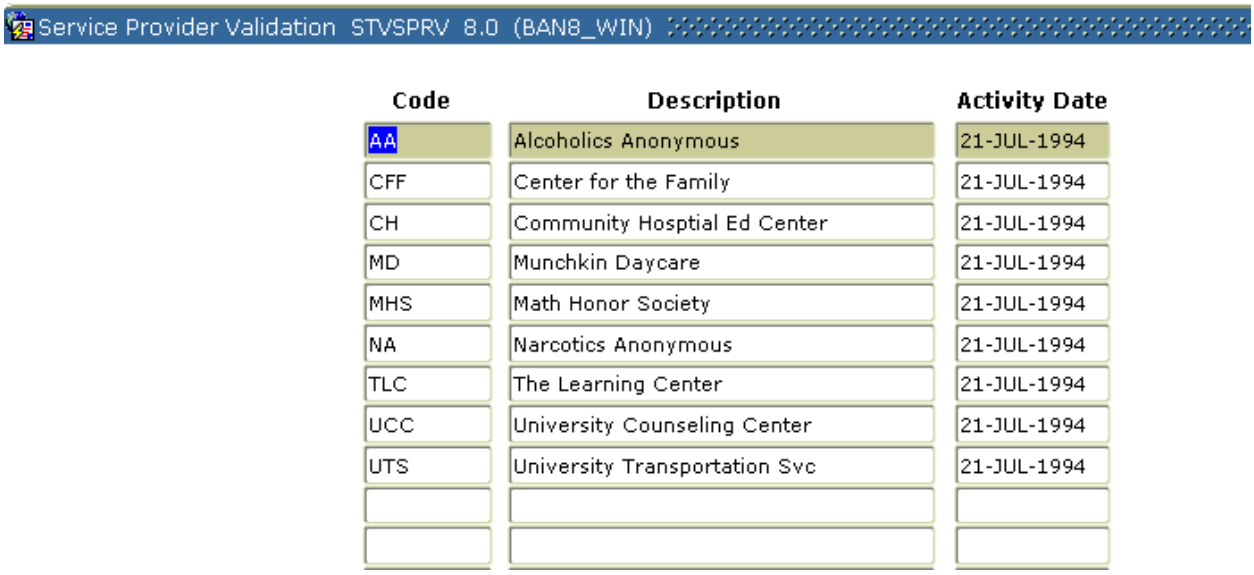
3. Enter a description of the State F/A Eligibility in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Service Provider Validation

Purpose

Use the Service Provider Validation Form (STVSPRV) to create, update, and delete the service provider codes, such as Training Center, Counseling Center, Learning Center). The Support Services module uses this form to validate the support services provider codes. You can create and update these codes only from this form.

Banner form



Steps

Follow these steps to create a service provider code.

1. Access the Service Provider Validation Form (STVSPRV).
2. Enter up to six characters for the service provider code in the **Code** field.

   Note: Once a service provider code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the service provider code record cannot be deleted.

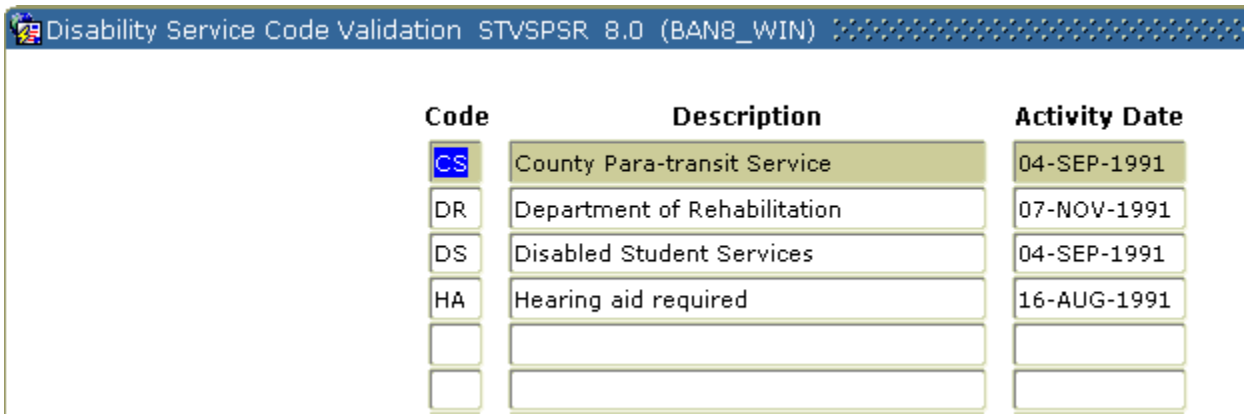
3. Enter a description of the service provider in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Disability Service Code Validation

Purpose

Use the Disability Service Code Validation Form (STVSPSR) to create, update, insert, and delete disability service codes, such as County Paratransit Service, Hearing Aid Required, Disabled Student Services, and so on. The Medical Information Form (GOAMEDI) uses this form to validate the disability service codes. You can create and update these codes only from this form.

Banner form



Steps

Follow these steps to create a disability service code.

1. Access the Disability Service Code Validation Form (STVSPSR).
2. Enter a two-character code of the disability service in the **Code** field.

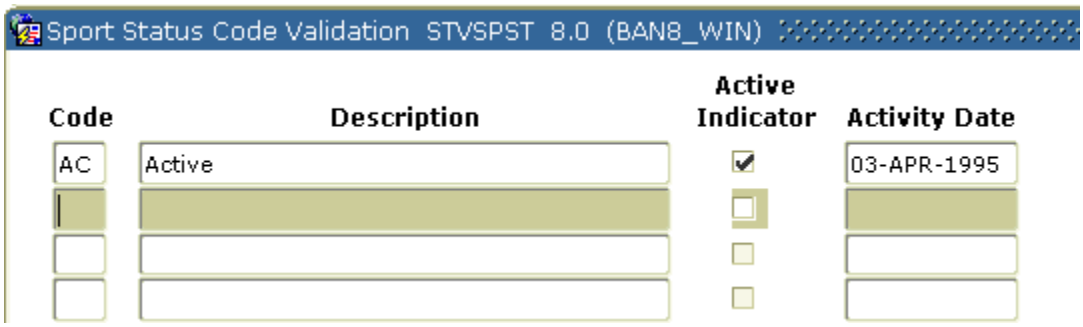
   Note: Once a disability service code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the disability service code record cannot be deleted.
3. Enter a description of the disability service in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Sport Status Validation

Purpose

Use the Sport Status Code Validation Form (STVSPST) to create, update, insert, and delete sport status codes used in the General Student module. The Student Sport Form (SGASPRT) uses this form to validate the sport status codes. You may only create or update these codes from this form.

Banner form



Steps

Follow these steps to create a sport status code.

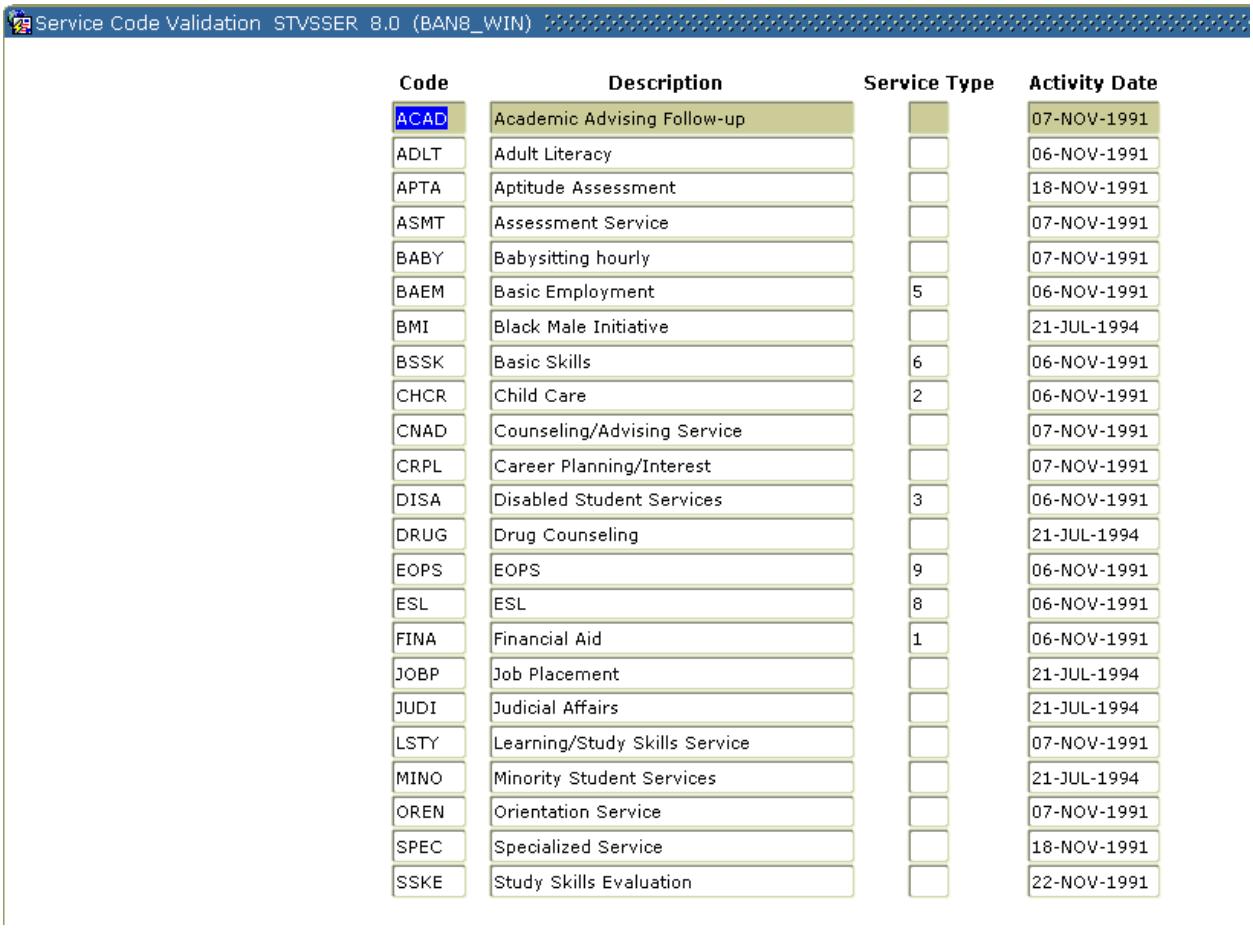
1. Access the Sport Status Code Validation Form (STVSPST).
2. Enter a two-character code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Check the **Active Indicator** if the code indicates an active status.
5. Click the **Save** icon.
6. Click the **Exit** icon.

Service Code Validation

Purpose

Use the Service Code Validation Form (STVSSER) to create, update, insert, and delete service codes such as Day Care, Career Planning, Transportation. The Support Services module uses this form to validate service codes. You can create or update services only from this form.

Banner form



Code	Description	Service Type	Activity Date
ACAD	Academic Advising Follow-up		07-NOV-1991
ADLT	Adult Literacy		06-NOV-1991
APTA	Aptitude Assessment		18-NOV-1991
ASMT	Assessment Service		07-NOV-1991
BABY	Babysitting hourly		07-NOV-1991
BAEM	Basic Employment	5	06-NOV-1991
BMI	Black Male Initiative		21-JUL-1994
BSSK	Basic Skills	6	06-NOV-1991
CHCR	Child Care	2	06-NOV-1991
CNAD	Counseling/Advising Service		07-NOV-1991
CRPL	Career Planning/Interest		07-NOV-1991
DISA	Disabled Student Services	3	06-NOV-1991
DRUG	Drug Counseling		21-JUL-1994
EOPS	EOPS	9	06-NOV-1991
ESL	ESL	8	06-NOV-1991
FINA	Financial Aid	1	06-NOV-1991
JOBP	Job Placement		21-JUL-1994
JUDI	Judicial Affairs		21-JUL-1994
LSTY	Learning/Study Skills Service		07-NOV-1991
MINO	Minority Student Services		21-JUL-1994
OREN	Orientation Service		07-NOV-1991
SPEC	Specialized Service		18-NOV-1991
SSKE	Study Skills Evaluation		22-NOV-1991

Steps

Follow these steps to create a service code.

1. Access the Service Code Validation Form (STVSSER).
2. Enter a four-character service code in the **Code** field.

   Note: Once a service code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the service code record cannot be deleted.

3. Enter a description of the service in the **Description** field.
4. Enter a two-character code in the **Service Type** field to further define the service code.
5. Click the **Save** icon.
6. Click the **Exit** iicon.

Service Result Validation

Purpose

Use the Service Result Validation Form (STVSSRS) to create, update, insert, and delete student service result codes, such as Promotion Obtained, Job Obtained, Goal Not Met, and so on. The Support Services module uses this form to validate service result codes. You can create or update service result codes only from this form.

Banner form

Steps

Follow these steps to create a student service result code.

1. Access the Service Result Validation Form (STVSSRS).
2. Enter a two-character service result code in the **Code** field.

   Note: Once a service result code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the service result code record cannot be deleted.

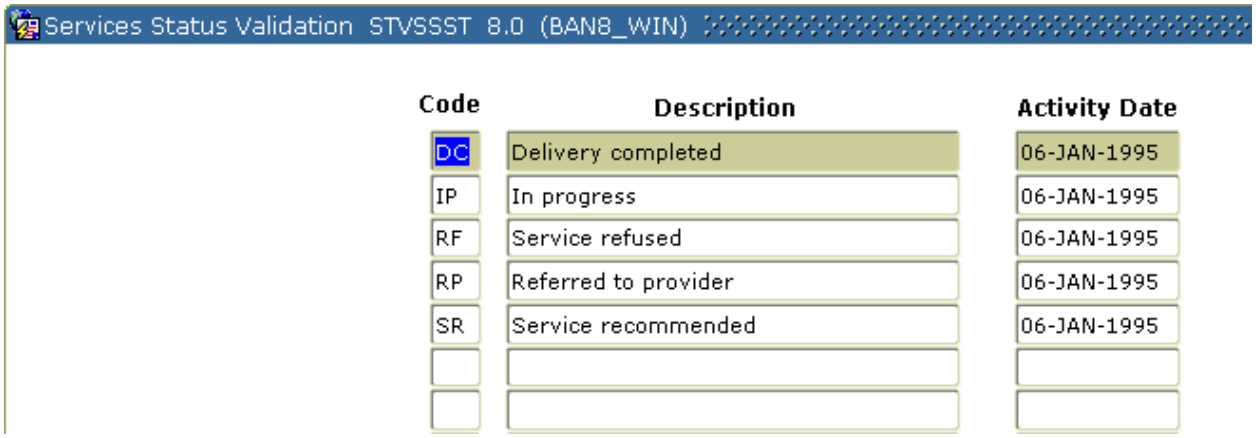
3. Enter a description of the service result in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Services Status Validation

Purpose

Use the Services Status Validation Form (STVSSST) to create, update, insert, and delete services status codes, such as In Progress, Service Refused, Referred to Provider). The Support Services module uses this form to validate service status codes. You can create or update these codes only from this form.

Banner form



Steps

Follow these steps to create a services status code.

1. Access the Services Status Validation Form (STVSSST).
2. Enter a four-character services status code in the **Code** field.

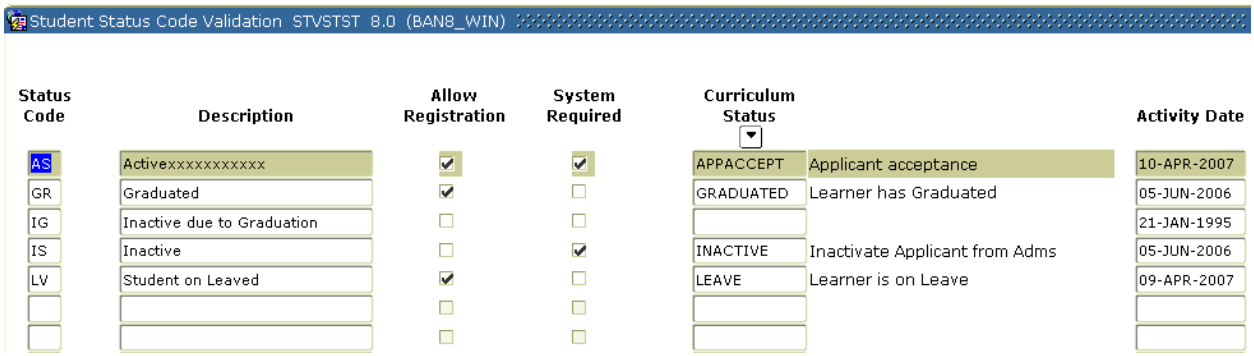
   Note: Once a services status code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the services status code record cannot be deleted.
3. Enter a description of the services status in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student Status Code Validation

Purpose

Use the Student Status Code Validation Form (STVSTST) to create, update, insert, and delete student status codes (i.e., Active, Withdrawn, Inactive Due to Graduation, etc.). Forms in several modules use this form to validate the student status codes. You can only create and update these codes from this form.

Banner form



Steps

Follow these steps to create a student status code.

1. Access the Student Status Code Validation Form (STVSTST).
2. Enter a two-character code in the **Status Code** field.
3. Enter a description of the status code in the **Description** field.
4. Click the **Allow Registration** checkbox if registration is allowed with the associated student status.
5. Do not check **System Required** checkbox.

   Note: If the **System Required** checkbox is checked, the validation table record cannot be deleted.

6. Select a status in the **Curriculum Status** field. (This is only necessary if your institution does not intend to use delivered processes associated with Curriculum status.)
7. Click the **Save** icon.
8. Click the **Exit** icon.

Student Type Code Validation

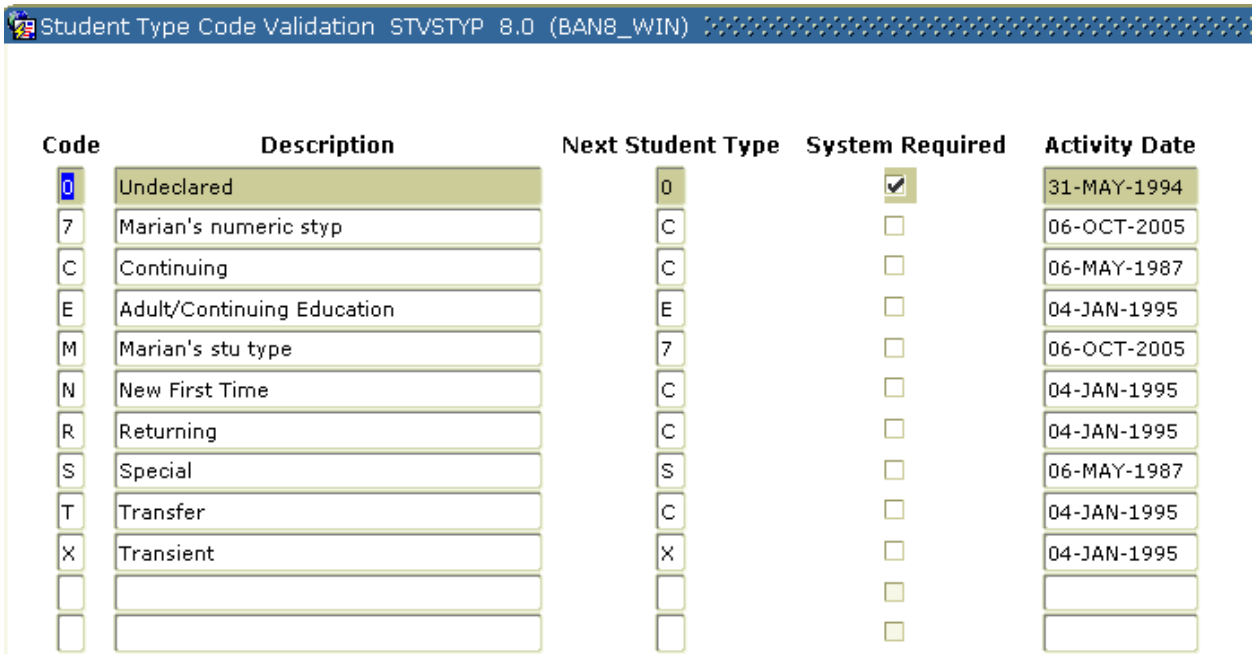
Purpose

Use the Student Type Code Validation Form (STVSTYP) to create, update, insert, and delete student type codes (i.e., Returning Freshman, Continuing, Transfer, etc.). Several forms in various modules use this form to validate the student type codes. You can only create and update these codes from this form.

The following student type codes should be created for IPEDS reporting:

- Freshman
- First Time Freshman
- Unclassified
- Continuing
- First Time Graduate
- First Time Professional

Banner form



Steps

Follow these steps to create a student type code.

1. Access the Student Type Code Validation Form (STVSTYP).

2. Enter a one-character code in the **Code** field.

3. Enter a description of the code in the **Description** field.

4. Enter a code in the **Next Student Type** field to identify the student type to be assigned, if appropriate, when the Student Type Update Report (SHRTYPE) is run. This value is generally updated from term to term rather than from year to year on the General Learner Record.

   Example: The Next Student Type for A - *First Time Freshman* would be *C - Continuing*. The Next Student Type for an *E - Adult Continuing Education* Code would be *E - Adult Continuing Education* since the status for this type of student would not change from year to year.

5. Do not check the **System Required**.

   Note: The **System Required** checkbox is used to set up a default when residency is not entered in the Recruiting module, and the prospect record is pulled to the Admissions module to build the application. If the **System Required** checkbox is checked, the validation table record cannot be deleted.

6. Repeat steps 2-5 until all codes are set up.

7. Click the **Save** icon.

8. Click the **Exit** icon.

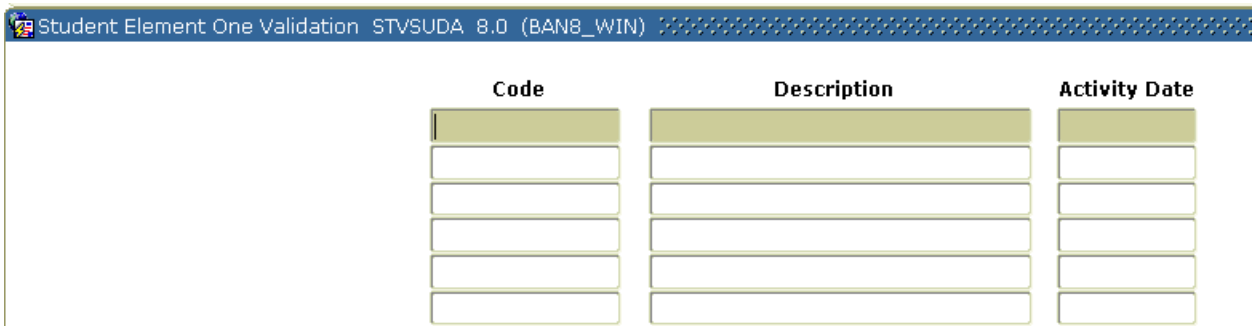
Student Element One Validation

Purpose

Use the Student Element One Validation Form (STVSUDA) to create, update, insert, and delete institutional reporting data elements specific to an institution's needs for state or local reporting for a student. This form is one of ten (STVUDA, STVUDB, STVUDC,...,STVUDJ) used in the General Student module for this purpose. You can create or update values for **Element 1** on the Student Institutional Reporting Requirements Form (SGAUSDF) from the Student Element One Validation Form (STVSUDA). Elements 2 through 10 are created on the subsequent respective STVSUDx form.

These validation forms correspond to Elements 1 through 10 on the Student Institutional Reporting Requirements Form (SGAUSDF). They are all completed in the same manner.

Banner form



Steps

Follow these steps to create an institutional reporting data element.

1. Access the Student Element One Validation Form (STVSUDA).

2. Enter up to fifteen characters for the code of the student institutional reporting element 1 in the **Code** field.

   Note: Once a student institutional reporting element code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the student institutional reporting element code record cannot be deleted.

3. Enter a description of the student institutional reporting element in the **Description** field.

4. Click the **Save** icon.

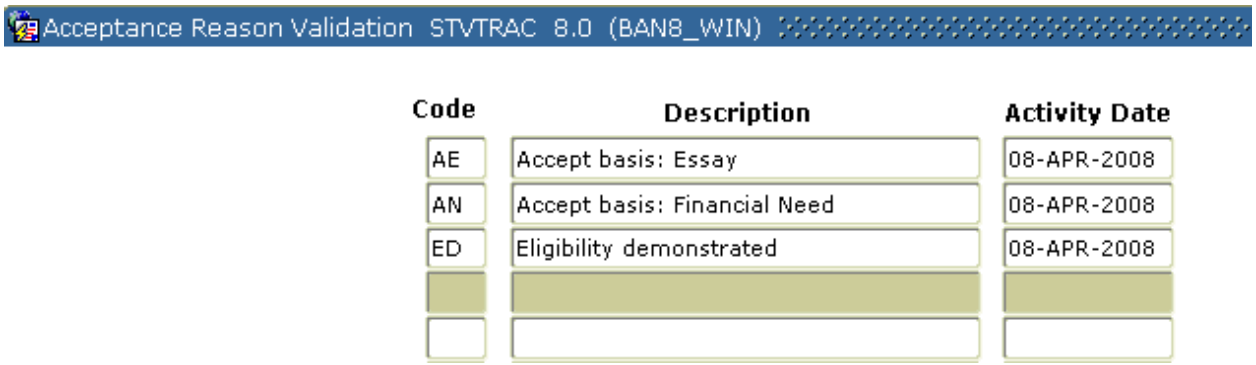
5. Click the **Exit** icon.

Acceptance Reason Validation

Purpose

Use the Acceptance Reason Validation Form (STVTRAC) to create, update, insert, an EOPS (Educational Opportunity Programs and Services) reason of acceptance codes for use in the General Student module. You can create or update these codes only from this form.

Banner form



Steps

Follow these steps to create an EOPS (Educational Opportunity Programs and Services) reason of acceptance code.

1. Access the Acceptance Reason Validation Form (STVTRAC).
2. Enter a three-character EOPS acceptance reason code in the **Code** field.

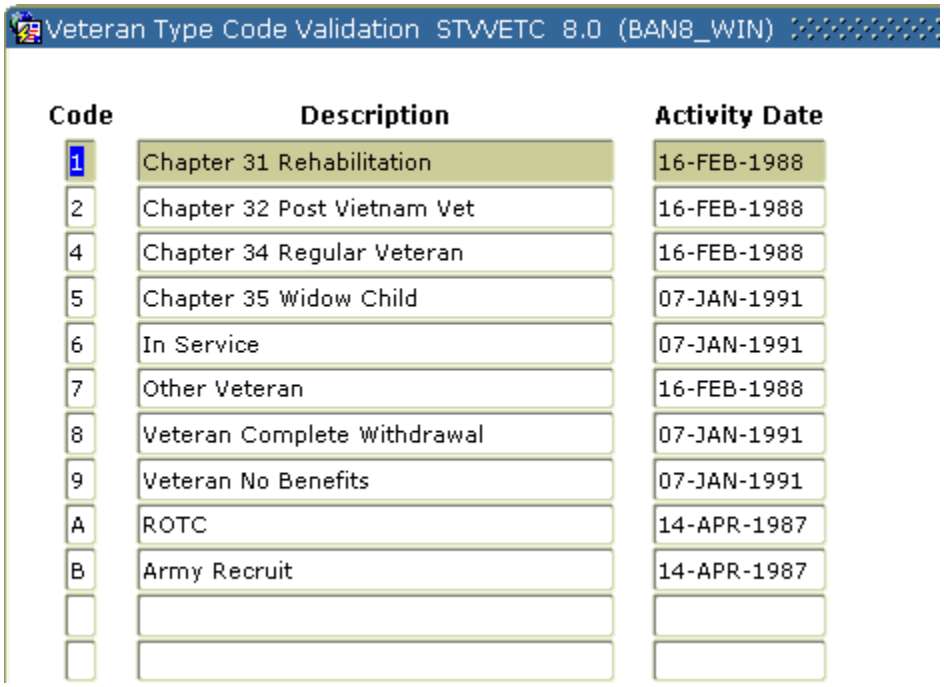
   Note: Once an EOPS acceptance reason code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the EOPS acceptance reason code record cannot be deleted.
3. Enter a description of the EOPS acceptance reason in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Veteran Type Code Validation

Purpose

Use the Veteran Type Code Validation Form (STVVETC) to create, update, insert, and delete veteran type codes (e.g., Chapter 32 Post Vietnam Vet, Other Veteran, ROTC, etc.). The General Student Form (SGASTDN) uses this form to validate the veteran type codes. You can only create and update these codes from this form.

Banner form



Steps

Follow these steps to create a veteran type code.

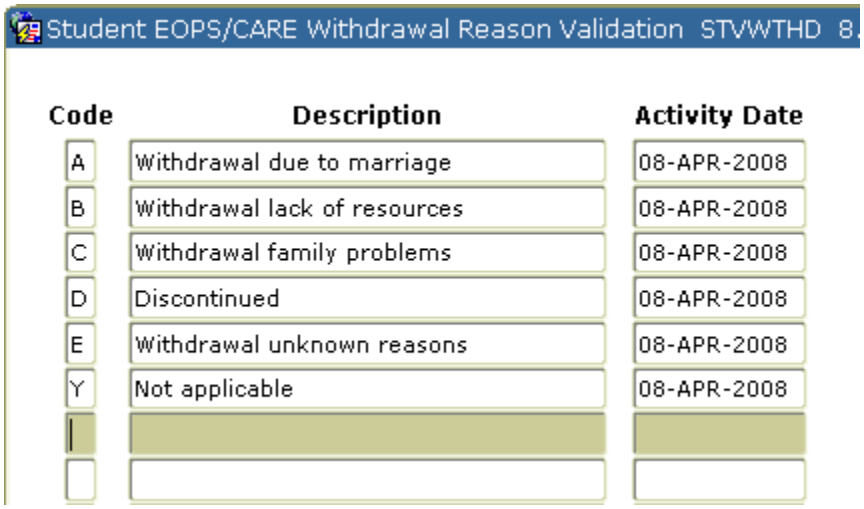
1. Access the Veteran Type Code Validation Form (STVVETC).
2. Enter a one character veteran code in the **Code** field.
3. Enter a description of the code in the **Description** field.
4. Click the **Save** icon.
5. Click the **Exit** icon.

Student EOPS/CARE Withdrawal Reason Validation

Purpose

Use the Student EOPS/CARE Withdrawal Reason Validation Form (STVWTHD) to create, update, insert, and delete codes which indicate a student's reason for withdrawing from the EOPS (Educational Opportunity Programs and Services) and/or CARE programs for the following term, as of the end of the reporting term. Examples are Lack of Resources, Student or Family Problems, Discontinued (Academic Reasons). You can create or update these codes only from this form.

Banner form



Steps

Follow these steps to create a code which indicate a student's reason for withdrawing from the EOPS (Educational Opportunity Programs and Services) and/or CARE programs.

1. Access the Student EOPS/CARE Withdrawal Reason Validation Form (STVWTHD).

2. Enter a one-character EOPS/CARE withdrawal reason code in the **Code** field.

   Note: Once an EOPS withdrawal reason code record has been saved, the code entered in this field cannot be changed. Once this code has been used in any other record, the EOPS withdrawal reason code record cannot be deleted.

3. Enter a description of the EOPS withdrawal reason in the **Description** field.

4. Click the **Save** icon.

5. Click the **Exit** icon.

Student Classification Rules

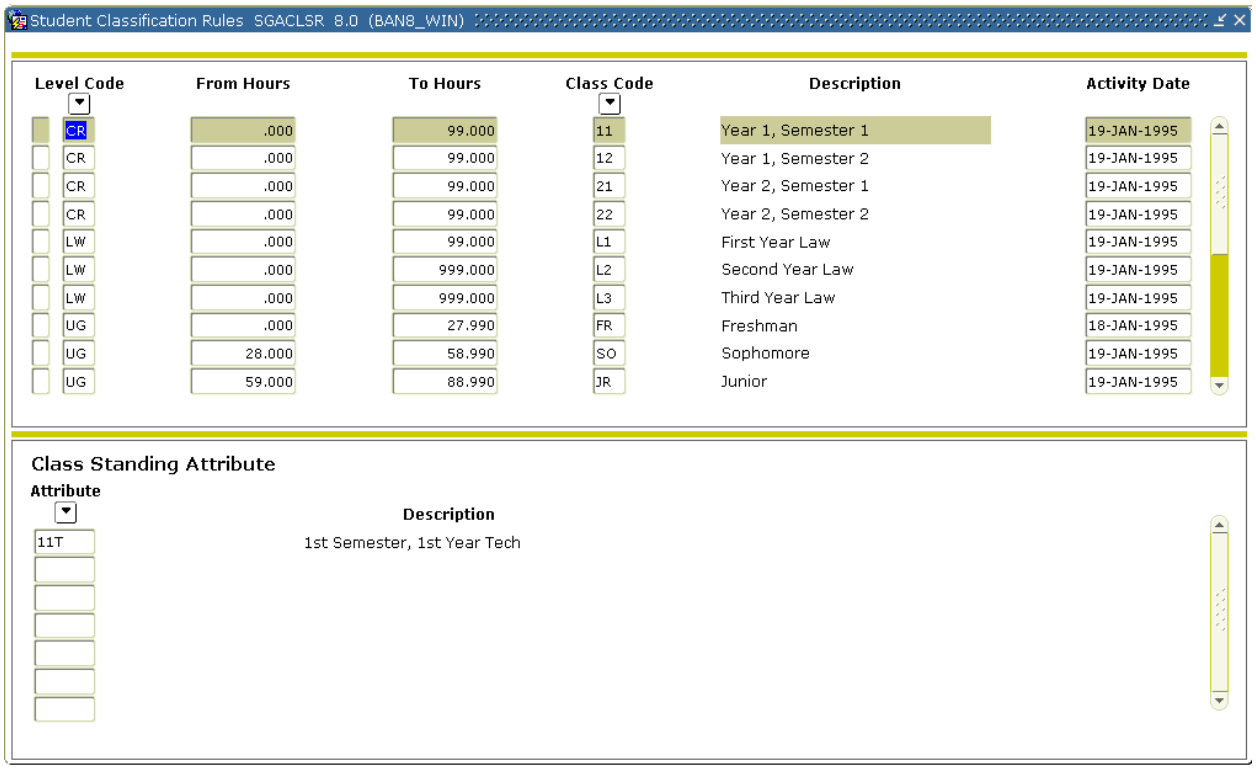
Purpose

Use the Student Classification Rules Form (SGACLSR) to establish the academic classification rules based on the range of hours entered and user-defined student attributes. The **To Hours** must be greater than the **From Hours** when creating a rule.

The Class Code Validation Form (STVCLAS), the Level Code Validation Form (STVLEVL), and the Attribute Validation Form (STVATTR) must be established prior to entering this form. When attributes are maintained for a rule, then the student must fall within the credit hour requirement and have the attribute code for the effective term on the Additional Student Information Form (SGASADD).

Note: Student classification rules must exist for students of all levels. If classification rules do not exist for a certain level of students, they will *not* be reported in the Unduplicated Headcount Report (SFRHCNT).

Banner form


Student Classification Rules SGACLSR 8.0 (BAN8_WIN)
Level Code
From Hours
To Hours
Class Code
Description
Activity Date
CR .000 99.000 11 Year 1, Semester 1 19-JAN-1995
CR .000 99.000 12 Year 1, Semester 2 19-JAN-1995
CR .000 99.000 21 Year 2, Semester 1 19-JAN-1995
CR .000 99.000 22 Year 2, Semester 2 19-JAN-1995
LW .000 99.000 L1 First Year Law 19-JAN-1995
LW .000 999.000 L2 Second Year Law 19-JAN-1995
LW .000 999.000 L3 Third Year Law 19-JAN-1995
UG .000 27.990 FR Freshman 18-JAN-1995
UG 28.000 58.990 SO Sophomore 19-JAN-1995
UG 59.000 88.990 JR Junior 19-JAN-1995
Class Standing Attribute
Attribute
Description
11T 1st Semester, 1st Year Tech

Steps

Follow these steps to create a student classification rule.

1. Access the Student Classification Rules Form (SGACLSR).
2. Perform an **Insert Record** function.
3. Enter a two-character code in the **Level Code** field.
4. Enter an amount in the **From Hours** field.
5. Enter an amount in the **To Hours** field.
6. Select a class code in the **Class Code** field.
7. Double-click in the **Attribute** field and select a class standing student attribute code. This field is optional.
8. Repeat steps 2-7 as needed.
9. Click the **Save** icon.
10. Click the **Exit** icon.

Self Check

Directions

Use the information you have learned in this section to complete this self-check activity.

Question 1

What is a communication plan?

Question 2

What is a Student's Right to Know?

Question 3

Name at least two student type codes that should be created on the Student Type Code Validation Form (STVSTYP) for IPEDS reporting.

Answer Key for Self Check

Question 1

What is a communication plan?

A set of rules designed to implement institution preferences regarding who should receive which materials and when those materials should be sent. Materials can be generated (letter or label) or published (department brochures).

Example: All accepted high school students who apply for admissions into the Education program receive a letter acknowledging acceptance into both the university and the Education program. However, all accepted high school students who apply for admissions into the Nursing program receive a letter acknowledging acceptance into just the university and instructions for next steps on how to apply at a later time to the Nursing program. Prospective nursing students also receive a Nursing program brochure along with their acceptance letter into the university.

Question 2

What is a Student's Right to Know?

This legislation requires that an institution of higher education annually disclose information about its student body's completion and graduation rates.

For more information, refer to *Maintaining and Monitoring Student Right to Know Reporting* in *Section C: Day-to-Day Operations* of this training workbook.

Question 3

Name at least two student type codes that should be created on the Student Type Code Validation Form (STVSTYP) for IPEDS reporting.

The following student type codes should be created for IPEDS reporting:

- **Freshman**
- **First Time Freshman**
- **Unclassified**
- **Continuing**
- **First Time Graduate**
- **First Time Professional**

Day-to-Day Operations

Section goal

The purpose of this section is to explain the process and detail the procedures to use the General Student Module.

Objectives

In this lesson you will learn how to

- create a general student record
- use Mass Entry forms to update multiple student records
- change a major and add a minor
- process a leave of absence request
- enter veteran information
- add or change advisor information
- enter additional student information
- enter cooperative education information
- view a student's information
- enter guardian information
- maintain sports records
- maintain and monitor Student Right to Know reporting
- enter disability information
- enter EOPS information
- maintain required information

- perform purge processes.

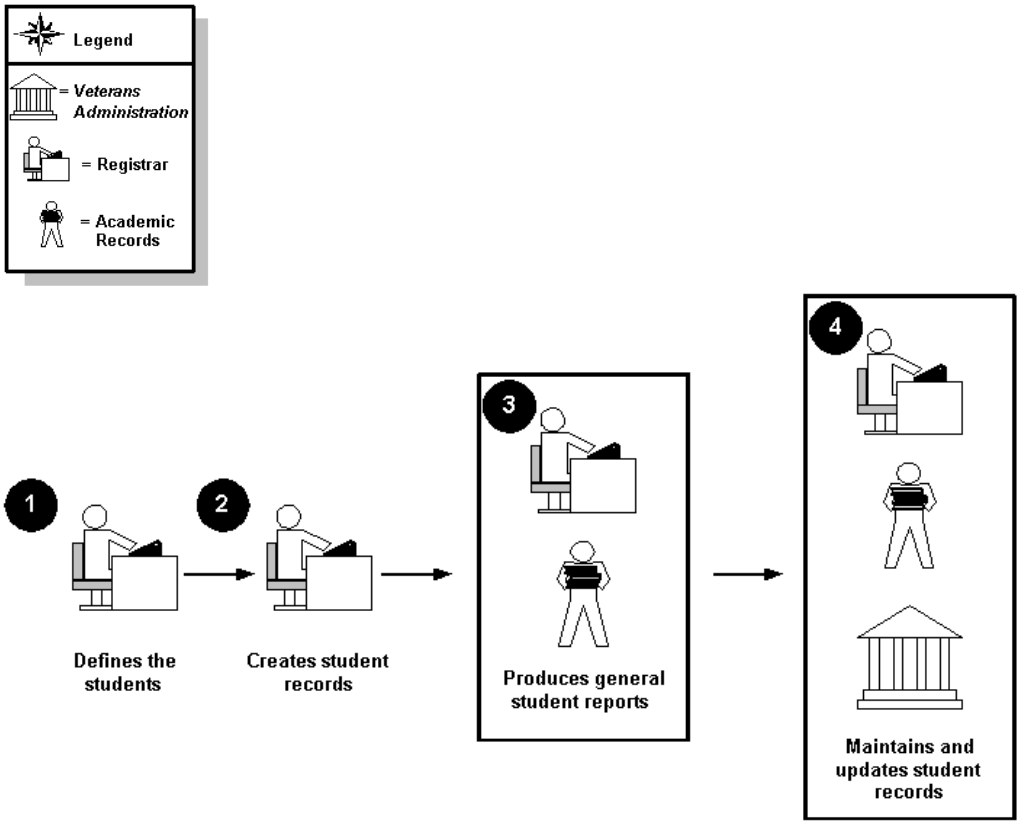
Process Introduction

Introduction

The Banner System requires that there be an Active General Student Record for the term before a student can register or be registered for courses and have tuition and fees assessed. The validation tables and rules for the General Student Module are used by the system to ensure that the student is registered into the correct courses and is assessed the correct tuition and fees.

Flow diagram

This flow chart highlights specifically what the General Student Module process would look like on a day to day basis.



What happens

The stages of the process are described in this table.

Stage	Description
Registrar	
1	Defines general student validation tables and rules
2	Creates Student records by offering a seat to the student and the student, then accepting the seat
Registrar / Academic Records / Veteran Admin Office	
3	Maintain and Update Student Records
4	Produce General Student reports and run General Student related processes (e.g., The Student Right to Know Report-SGRKNOW, Student Report-SGRSTDN and the Veteran report-SGRVETN Processes: Hold Purge-SGPHOLD, General Student Purge-SGPSTDN, Cooperative Education Purge-SGPCOOP, Student Block Load Process-SGPBLCK and Cohort Load Process-SGRCHRT)

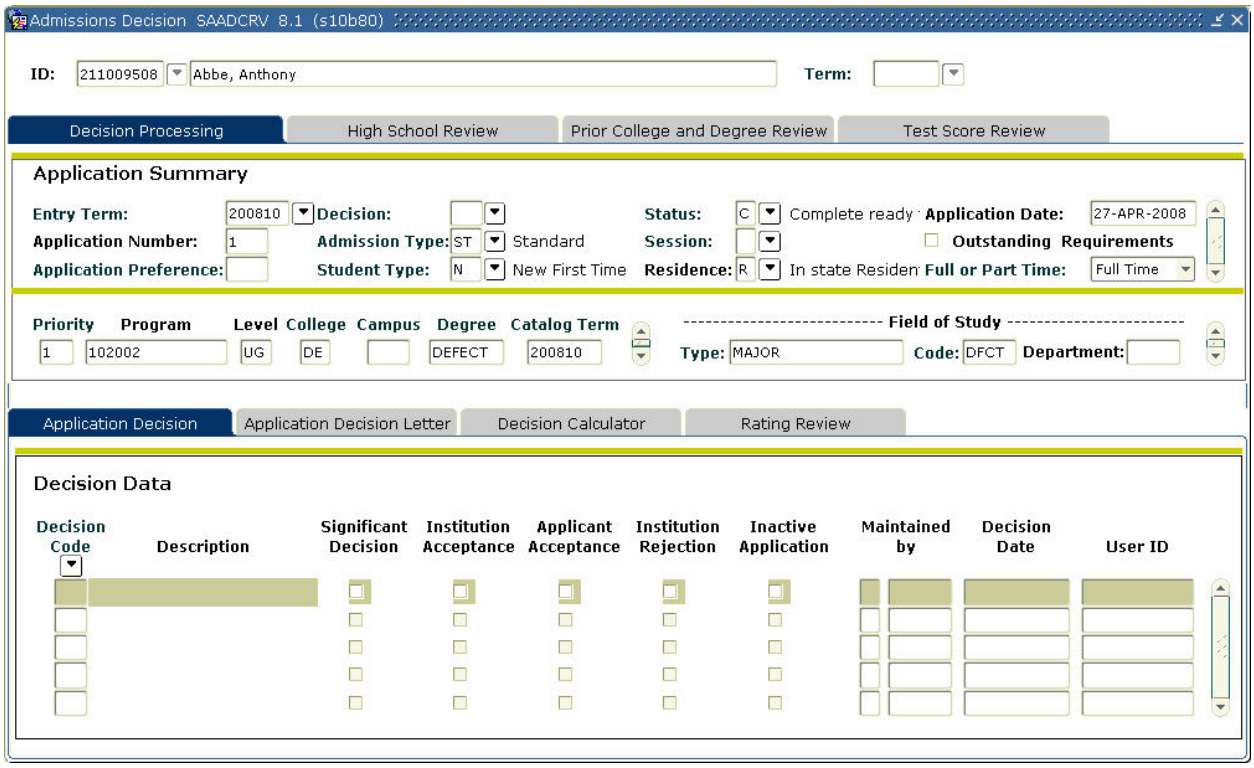
Creating a General Student Record

Purpose

Information about a student is initially created when a decision is entered on the Admissions Decision Form (SAADCRV), which indicates that the applicant accepts the institution's offer of admission, or when an applicant is admitted via the Quick Entry Form (SAAQUIK). An applicant must accept the institution's offer of admissions to generate an initial general student record or the Quick Entry Form must have been processed for the student. This record may not be deleted if registration or academic history records exist for a term or if associated sports records exist.

The Admissions Decision Form (SAADCRV) is used to enter decisions for an admissions application. Once a decision is entered or calculated to indicate that the student has accepted and plans to attend, a general student record is automatically created using the information entered on the application. This record allows the student to be eligible to register.

Banner form



Steps

Follow these steps to create a General Student record.

Note: A student's application information must exist or be entered on the Admissions Application Form (SAAADMS) to use this form.

1. Access the Admissions Decision Form (SAADCRV).
2. Click the down arrow next to the **ID** field.
3. Enter a few characters of a last name with the wildcard (*%*) at the end in the **Last Name** field and press enter to begin the search.
4. Click on the drop-down by the **Results** field in the pop-up box to select your applicant.
5. Scroll through the list of names to find the applicant you created and used during the Admissions Training.

   Note: Make a note of the student's name and ID because they will be used in future lessons. Each participant must pick a unique student.
6. Perform a **Next Block** function.
7. Using the scroll bar on the right in the Application Summary block, select the application of interest.
8. Select a decision code in the **Decision Code** field. The decision entered should have the Applicant Acceptance checkbox checked in order for the General Student (Learner) record to be created.
9. Click the **Save** icon.

   Note: You will see the message, "Note: Student record created for admissions entry term."
10. Click the **OK** button.

    Note: You will see the message, "Transaction complete. 1 record applied and saved."
11. Click the **OK** button.
12. Click the **Exit** icon.

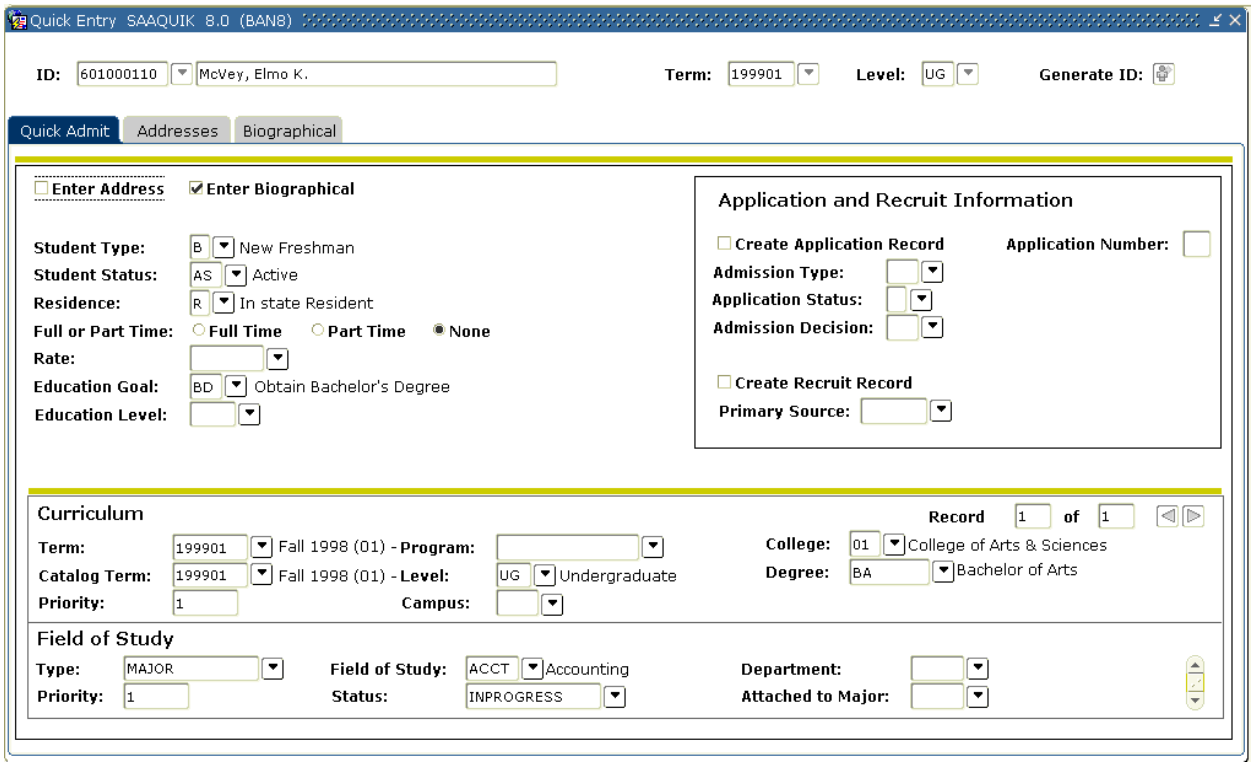
Using the Quick Entry Form

Purpose

The Quick Entry Form (SAAQUIK) is used to provide a way to enter and register persons on the system with minimal effort. This form is combined with the General Person Identification Form (SPAIDEN), which allows a person to be added to the system along with addresses (optional). It can also create recruiting and admissions records at the user's option, and will automatically create a student record that is required for registration.

Default rules for a specific level of applicant can be defined on the Quick Entry Rules Form (SAAQKER) so that when the ID, Term and Level are entered into the key block, the majority of data will be defaulted in from SAAQKER.

Banner form



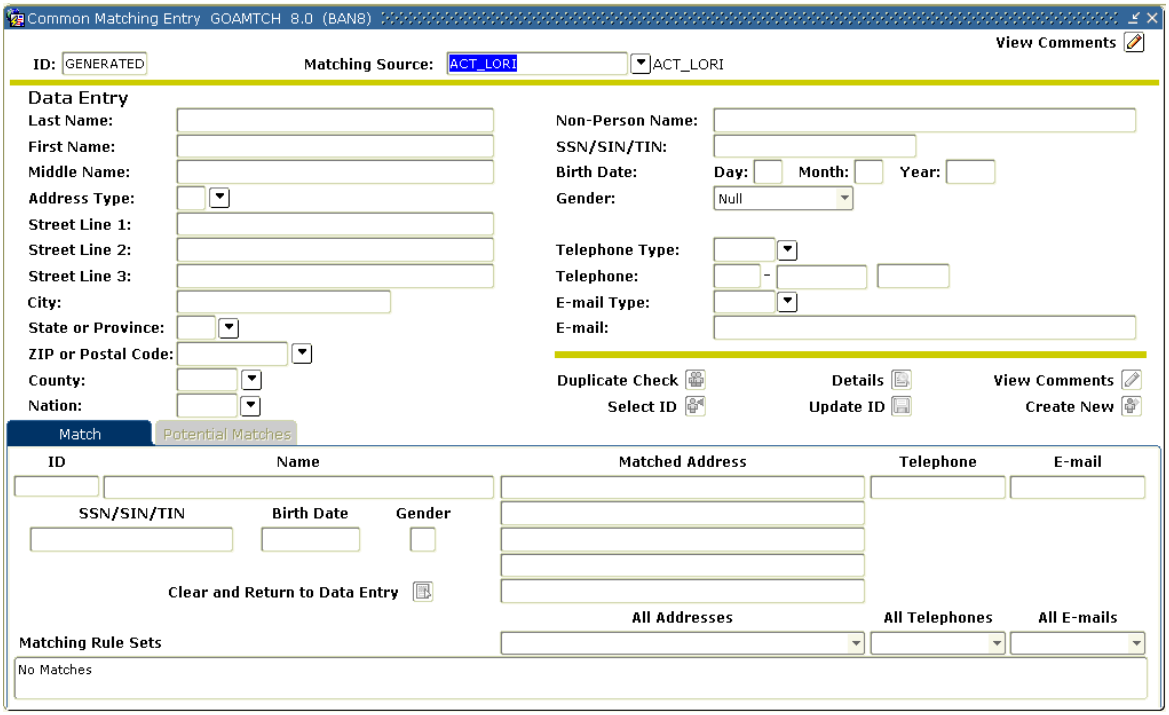
Steps

Follow these steps to create a General Student record using the Quick Entry Form.

1. Access the Quick Entry Form (SAAQUIK).

2. Select **Generate ID** in the **Options** menu, or enter *GENERATED* in the **ID** field and press Enter to open the Current Identification window.

   Result: The Common Matching Entry window opens.



3. Select a **Matching Source.**

4. Enter values in the **Last Name**, **First Name**, and **Middle Name** fields.

   Note: Each participant must create a unique student. Make a note of the student's name and ID because they will be used in future lessons.

5. Click the **Save** or **Duplicate Check** icon.

6. If there are no matches, select **Create New** and you will be returned to SAAQUIK.

7. Double-click in the **Term** field to select a term.

8. Double-click in the **Level** field and select *Undergraduate*.

9. Perform a **Next Block** function.

Result: You may receive the message “Defaulting values from Quick Entry Rules Form.” Note that many of the field values will default in based on the rules that have been created.

10. Click either the **Enter Address** checkbox or the **Enter Biographical** checkbox if you want to go directly to those tabs to enter that information.

    Result: The appropriate tab opens.

11. Complete steps 12 through 20 to enter address information.

12. Click the **Enter Address** checkbox and enter a date in the **From Date** field, if desired.

13. Select an address type in the **Address Type** field.

14. Enter a street address in the **Street Line 1** field.

15. Enter a city in the **City** field.

16. Enter a state or province code in the **State or Province** field.

17. Enter a zip or postal code in the **Zip or Postal Code** field.

18. Select a telephone type in the **Telephone Type** field.

19. Enter a telephone number in the **Telephone** field.

    Complete steps 20 through 30 to enter biographical information.

20. Click the **Enter Biographical** checkbox and select either the **Male** or **Female Gender** radio button as appropriate.

21. Enter a date in DD-MMM-YYYY (two digit day, three character month, four digit year) format in the **Birth Date** field.

22. Enter the appropriate number in the **SSN/SIN/TIN** field.

23. Select a citizenship code in the **Citizenship** field.

    Note: Your institution may not request this information. If it does not, the field can be left blank.

24. Enter the marital status in the **Marital Status** field.

25. Enter the religion in the **Religion** field, if known.

26. Enter the legacy information in the **Legacy** field, if known.

27. Select an ethnicity code in the **New Ethnicity** field.

Note: Your institution may not request this information. If it does not, the field can be left blank.

If you have confirmed this information, click the **Ethnicity and Race Confirmed** checkbox and enter a confirmed date in the **Confirmed Date** field.

28. Enter the appropriate veteran information in the **Veteran File Number**, **Veteran Category**, and **Active Duty Separation Date** fields, if this information applies. Otherwise, you may leave these fields blank.

29. Perform a **Next Block** function to access the Race block.

    Result: Information in the fields may default based on what you have selected in the Ethnicity field.

30. Enter additional race records in the **Race** field, if appropriate.

    Note: You cannot change an existing race.

31. Access the **Quick Admit** tab.

    Note: Some of these fields may have defaulted in, depending on the rules that have been created. If that is the case, you will not need to complete all fields.

32. Enter a student type code in the **Student Type** field.

    Example: *A* (1st Time Freshman)

33. Enter a student status code in the **Student Status** field.

    Example: *AS* (Active)

34. Enter a residence code in the **Residence** field.

35. Enter *F* if the student is full time or *P* if the student is part time in the **Full or Part Time** field. This field is optional.

36. Select a rate code in the **Rate** field. This field is optional.

37. Select an education goal in the **Education Goal** field. This field is optional.

38. Select an education level in the **Education Level** field. This field is optional.

39. Click the **Create Application Record** checkbox.

40. Select the type of admissions in the **Admission Type** field.

41. Select an application status code in the **Application Status** field.

42. Select an admissions decision in the **Admission Decision** field.

43. Perform a **Next Block** function to access the Curriculum block.

44. Select a catalog term in the **Catalog Term** field.

45. Enter a priority number that identifies curriculum rank in the **Priority** field.

46. Select a program from the All Program Codes option in the **Program** field.

    Note: The **College**, **Level**, and **Degree** fields may be filled in for you based on the program selected. If not, select values for these fields.

47. Select a campus code in the **Campus** field.

48. Enter a field of study priority number in the **Priority** field.

49. Access the Field of Study block.

50. Select *Major* in the **Type** field.

51. Select a status in the **Status** field.

52. Select a major, minor, or concentration code in the **Field of Study** field.

53. Click the **Save** icon.

54. Click the **OK** button to acknowledge that the records have been saved.

    Result: The Communication Plan window opens.

55. Click the **Save** icon to save the communication plan.

56. Click the **Return** button.

57. Click the **Exit** icon.

Changing a Major and Adding a Minor

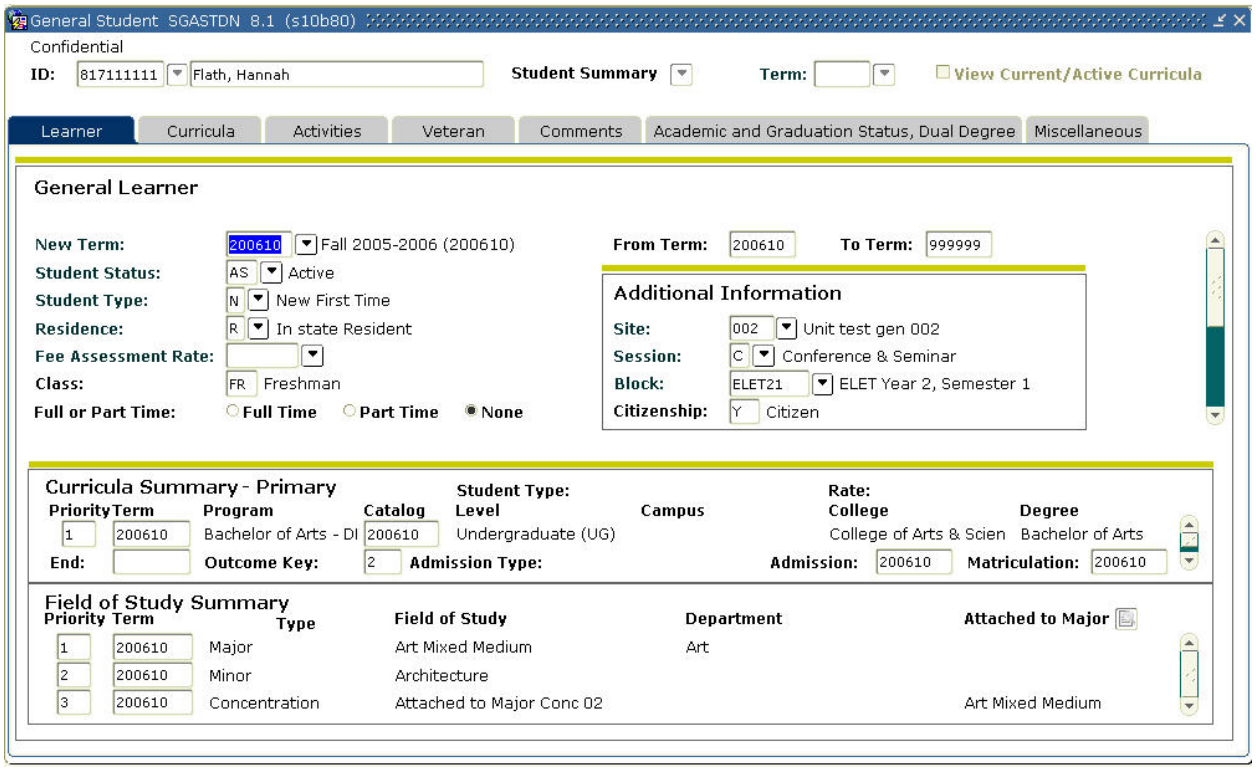
Purpose

The General Student Form (SGASTDN) is used to maintain current and historical information about a student.

The General Student Form also contains comments, activities, and veteran information. This record may not be deleted if registration or academic history exists for the term or if associated sports records exist.

Use the Curriculum window on the General Student Form (SGASTDN) to enter curriculum information for the student. You may view lists of attached majors, departments, minors, and concentrations by accessing the Help drop down menu and choosing the Help function from the corresponding **Major**, **Department**, **Minor**, and **Concentration** fields in this window. You may also double-click in the field and select the appropriate choice from the Option List.

Banner form


General Student SGASTDN 8.1 (s10b80)
Confidential
ID: 817111111 Flath, Hannah
Student Summary
Term:
View Current/Active Curricula
Learner
Curricula
Activities
Veteran
Comments
Academic and Graduation Status, Dual Degree
Miscellaneous
General Learner
New Term: 200610 Fall 2005-2006 (200610)
Student Status: AS Active
Student Type: N New First Time
Residence: R In state Resident
Fee Assessment Rate:
Class: FR Freshman
Full or Part Time: Full Time Part Time None
From Term: 200610
To Term: 999999
Additional Information
Site: 002 Unit test gen 002
Session: C Conference & Seminar
Block: ELET21 ELET Year 2, Semester 1
Citizenship: Y Citizen
Curricula Summary - Primary
Priority Term Program Catalog Student Type: Level Campus Rate: College Degree
1 200610 Bachelor of Arts - DI 200610 Undergraduate (UG) College of Arts & Scien Bachelor of Arts
End: Outcome Key: 2 Admission Type: Admission: 200610 Matriculation: 200610
Field of Study Summary
Priority Term Type Field of Study Department Attached to Major
1 200610 Major Art Mixed Medium Art
2 200610 Minor Architecture
3 200610 Concentration Attached to Major Conc 02 Art Mixed Medium

Steps

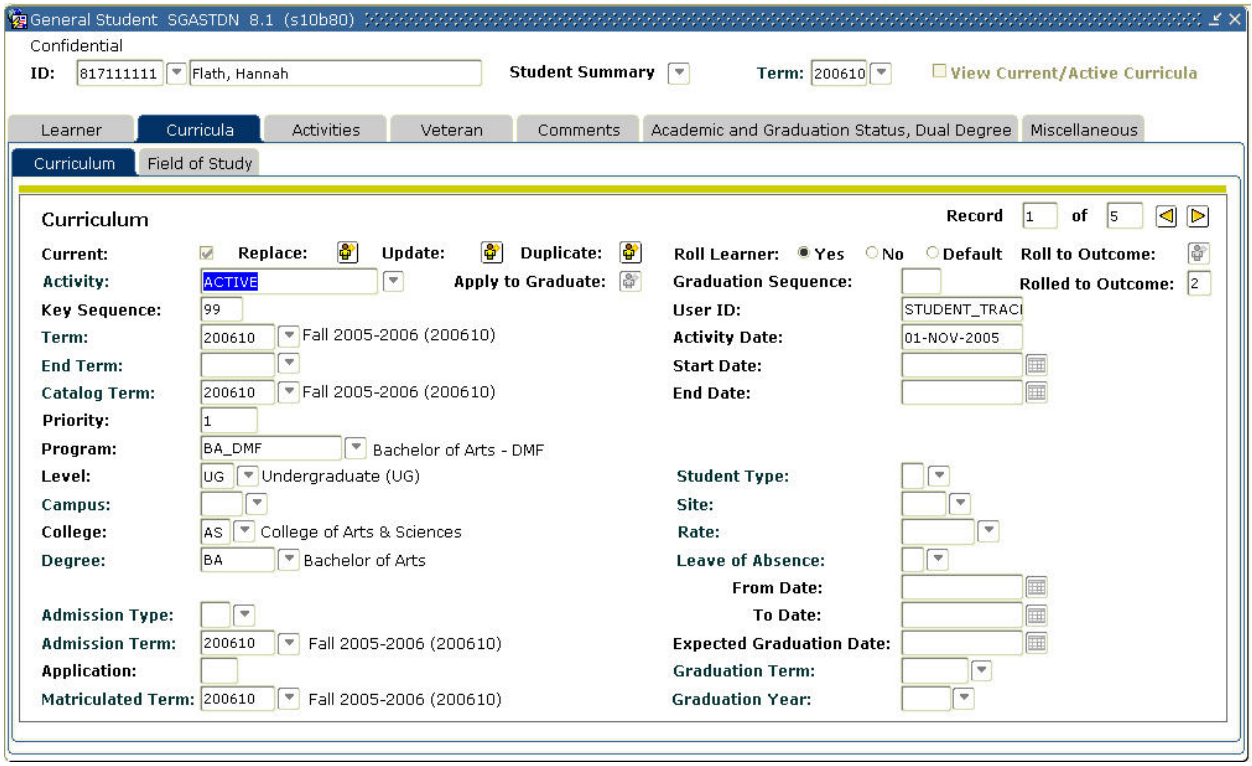
Follow these steps to complete the process of changing a major and adding a minor for the student created in the previous exercises.

Note: It is important to ensure that the major a student is being changed to is valid for the Program that the student is in. Appropriate combinations of major to program are established on the Curriculum Rules form (SOACURR).

1. Access the General Student Form (SGASTDN).
2. Enter the ID of the student in the **ID** field.

   Note: If you have forgotten the ID of your student, click the down arrow to find your student.
3. Select the term where the change will take place in the **Term** field.
4. Perform a **Next Block** function.
5. Perform a **Duplicate Record** function.
6. Click the down arrow in the **New Term** field.
7. Select **Create New Effective Term** from the by the **New Term** LOV list.
8. Click the down arrow in the **New Term** field again.
9. Select **List of Terms** .
10. Double-click on a term to return a term to the **New Term** field.
11. Click the **Save** icon.
12. Select the **Curricula** tab.

    Result: You are taken to the **Curricula** tab, which contains two additional tabs: **Curriculum** and **Field of Study**.



13. Click the **Replace** icon while on the curriculum row to be inactivated (it must currently be active and the most recent record for the priority).

    Result: The icon inactivates the curriculum row and inserts a new curriculum row for the new curriculum record.

14. Complete these fields: **Priority**, **Program**, **Level**, **Campus** (optional), **Degree** and **College**.

15. Perform a **Next Block** function.

    Result: You are taken to the **Field of Study** tab, within the **Curricula** tab.

16. Verify that the correct type is selected in the **Type** field.

17. Complete additional fields that have not already been completed, if necessary. For example, you may want to enter information in the **Attached to Major** and **Full or Part Time** fields, if appropriate.

    Note: At least one active row with Type = Major must exist. Without a major, you will not be able to save the record.

18. Click the **Save** icon.

19. Click the **Exit** icon.

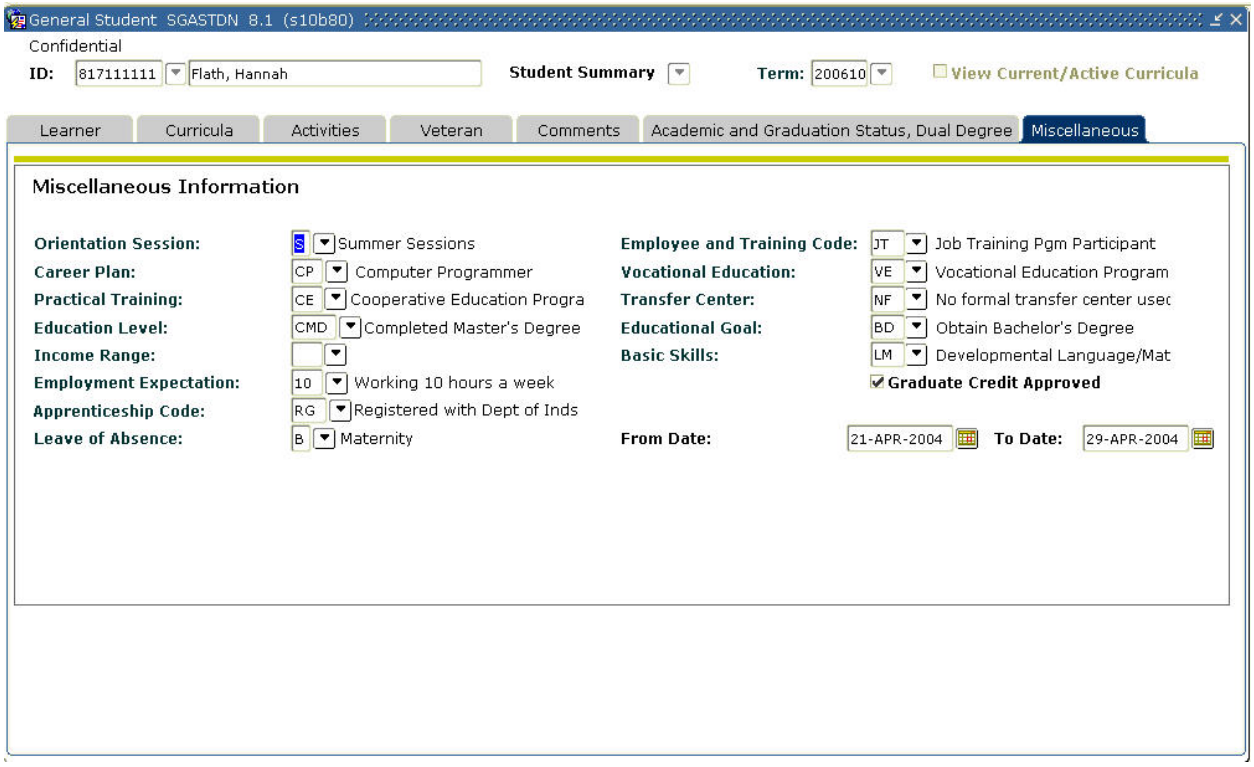
Processing a Leave of Absence Request

Purpose

The General Student Form (SGASTDN) is used to maintain current and historical information about a student.

The Miscellaneous Student Information window on the General Student Form (SGASTDN) is used to enter miscellaneous information for the student, such as practical training and leave information.

Banner form


General Student SGASTDN 8.1 (s10b80)
Confidential
ID: 817111111 Flath, Hannah
Student Summary
Term: 200610
View Current/Active Curricula
Learner
Curricula
Activities
Veteran
Comments
Academic and Graduation Status, Dual Degree
Miscellaneous
Miscellaneous Information
Orientation Session: S Summer Sessions
Career Plan: CP Computer Programmer
Practical Training: CE Cooperative Education Progra
Education Level: CMD Completed Master's Degree
Income Range:
Employment Expectation: 10 Working 10 hours a week
Apprenticeship Code: RG Registered with Dept of Inds
Leave of Absence: B Maternity
Employee and Training Code: JT Job Training Pgm Participant
Vocational Education: VE Vocational Education Program
Transfer Center: NF No formal transfer center usec
Educational Goal: BD Obtain Bachelor's Degree
Basic Skills: LM Developmental Language/Mat
Graduate Credit Approved
From Date: 21-APR-2004
To Date: 29-APR-2004

Steps

Follow these steps to process a leave of absence request.

1. Access the General Student Form (SGASTDN).
2. Enter the ID of your student in the **ID** field.

   Note: If you have forgotten the ID of your student, click the down arrow find your student.

3. Select a term in the **Term** field.
4. Perform a **Next Block** function.
5. Select the **Miscellaneous** tab.
6. Select a code in the **Leave of Absence** field.
7. Enter a start date in the **From Date** field.
8. Enter an end date in the **To Date** field.
9. Click the **Save** icon.
10. Click the **Exit** icon.

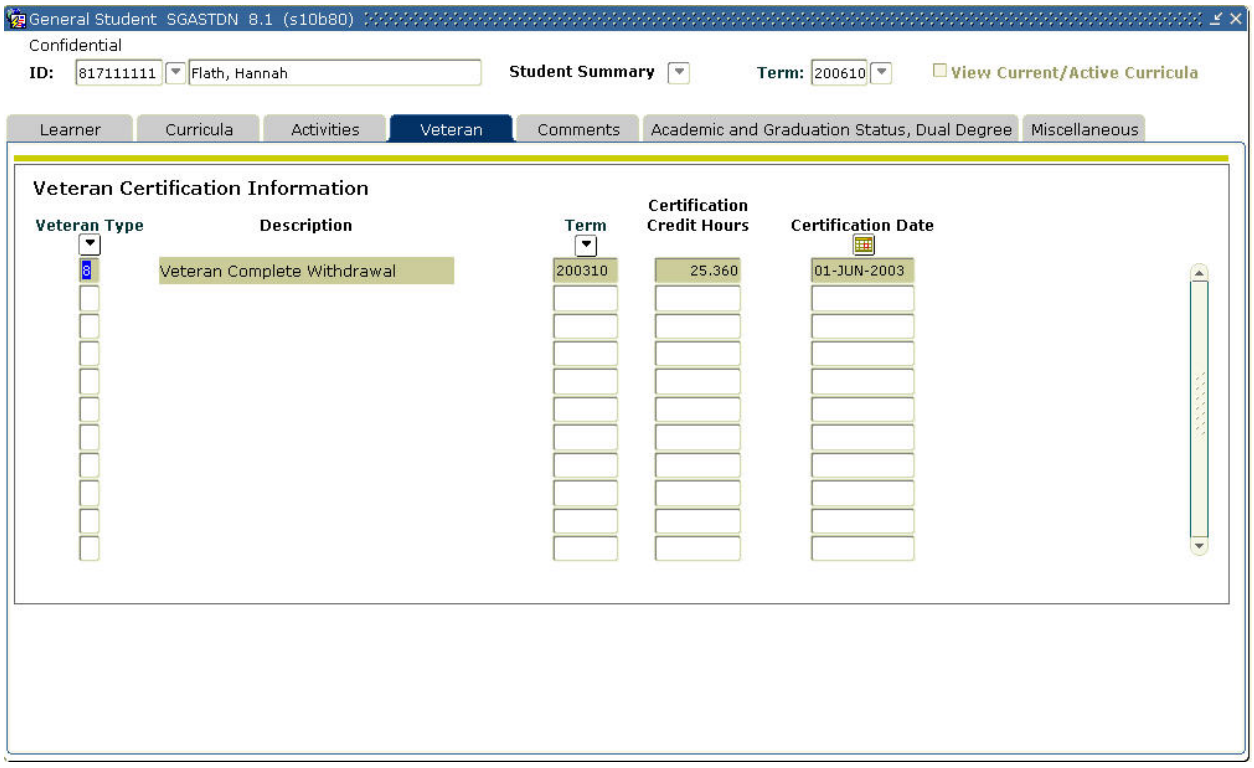
Entering Veteran Information

Purpose

The General Student Form (SGASTDN) is used to maintain current and historical information about a student.

The Veteran Information window is used to maintain veteran information.

Banner form



Steps

Follow these steps to enter veteran information.

1. Access the General Student Form (SGASTDN).
2. Enter the ID of your student in the **ID** field.

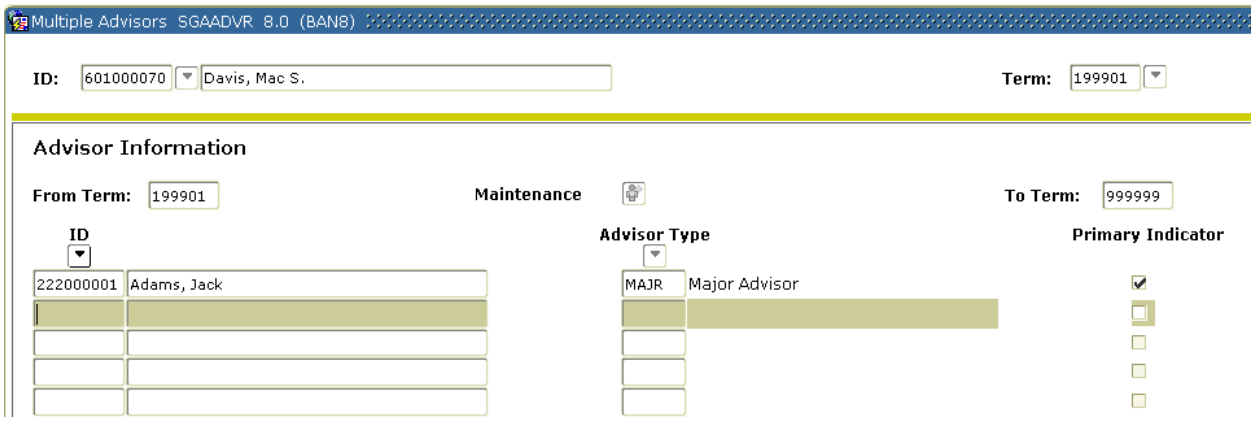
   Note: If you have forgotten the ID of your student, click the down arrow to find your student.
3. Select a term in the **Term** field.
4. Perform a **Next Block** function.
5. Select the **Veteran** tab.
6. Select a code in the **Veteran Type** field.
7. Select a term in the **Term** field.
8. Enter a number in the **Certification Credit Hours** field.
9. Enter a date in DD-MM-YYYY format in the **Certification Date** field.
10. Click the **Save** icon.
11. Click the **Exit** icon.

Adding or Changing Advisor Information

Purpose

The Multiple Advisors Form (SGAADVR) allows a student to be associated with an unlimited number of advisors for an effective term range. It also allows the user to view a student's existing advisors for an effective term range. Multiple advisors may be designated for any type of student, not just graduate students. A General Student record must exist to associate an advisor with a student. The user must designate a primary advisor if multiple advisors exist. If the primary advisor is deleted, the secondary advisor defaults into the primary place.

Banner form



Steps

Follow these steps to complete the process of adding an advisor to your student's record.

1. Access the Multiple Advisors Form (SGAADVR).
2. Enter the ID of the student in the **ID** field.

   Note: If you have forgotten the ID of your student, click the down arrow to find your student.
3. Select a term in the **Term** field.
4. Perform a **Next Block** function.
5. Select the down arrow in the **ID** field in the Advisor Information block.

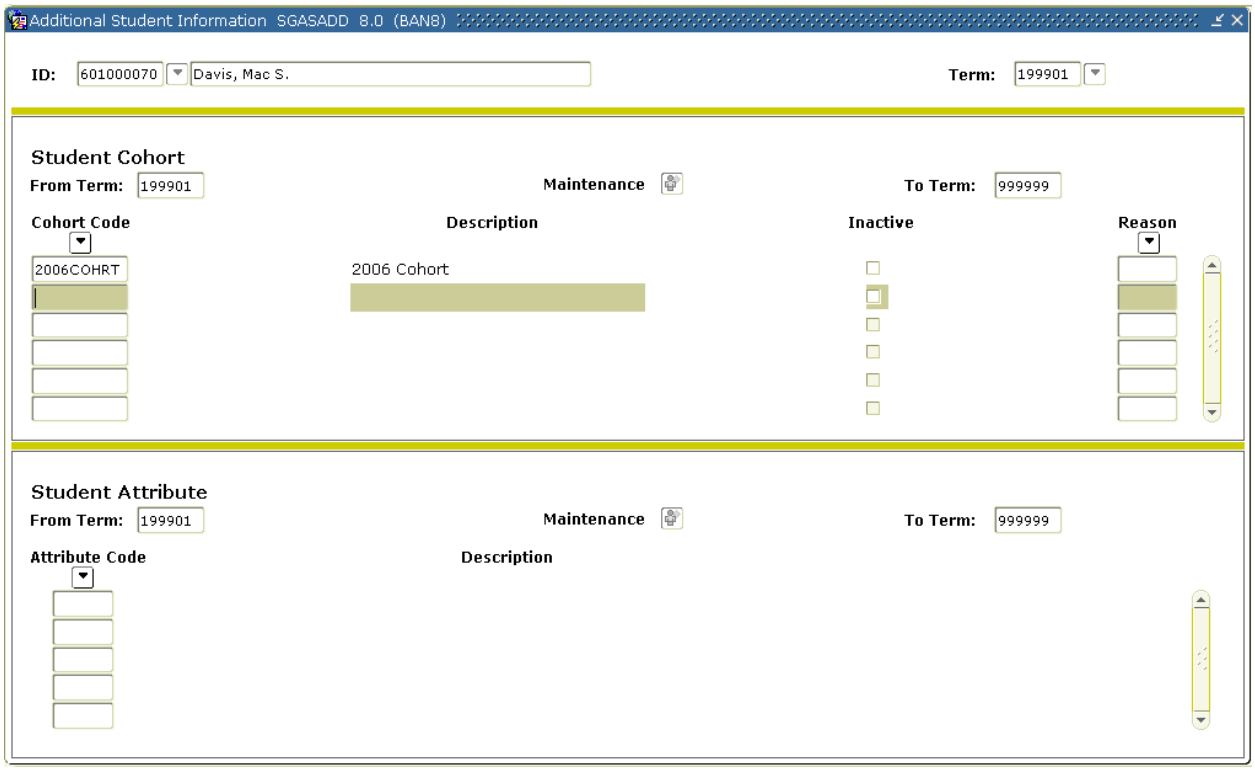
   Result: The **Faculty/Advisor Query Form** (SIAIQRY) opens.
6. Enter part of the advisor's last name in the **Last Name** field.
7. Perform an **Execute Query** function.
8. Double-click in the **ID** field to return the information to SGAADVR.
9. Select a code in the **Advisor Type** field. This field is optional.
10. Click the **Primary Indicator** checkbox to indicate that this is the student's primary advisor.
11. Click the **Save** icon.
12. Click the **Exit** icon.

Entering Additional Student Information

Purpose

The Additional Student Information Form (SGASADD) maintains cohort codes, as well as attributes, which are assigned to the student by effective term. The cohort information records and attributes can be created manually on this form or may be rolled from the Admissions module upon creating the student record. The person must be defined as a student for a term that is encompassed by the effective term range for that student on the General Student Form (SGASTDN).

Banner form



Steps

Follow these steps to add cohorts and attributes for your student.

1. Access the Additional Student Information Form (SGASADD).
2. Enter the ID of the student in the **ID** field.

   Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Select a term in the **Term** field.
4. Select a code in the **Cohort Code** field.

   Result: The **From Term** and **To Term** fields default.

5. Select a student attribute code in the **Attribute** field.
6. Click the **Save** icon.
7. A box will pop up that says “Changing Student Attribute may impact Registration Fee Assessment.” Click the **OK** button.
8. Click the **Exit** icon.

Entering Cooperative Education Information

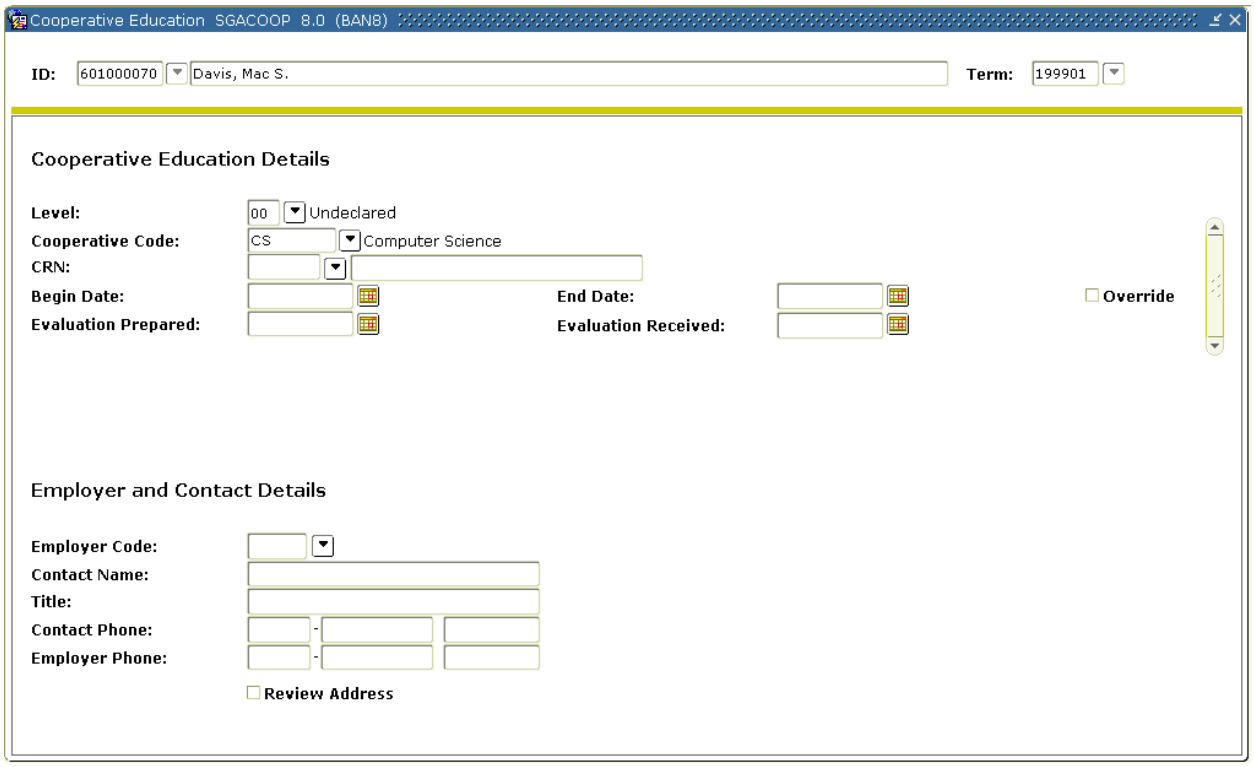
Purpose

The Cooperative Education Form (SGACOOP) is used to maintain data pertaining to the student's cooperative education positions. The form contains employer information as well as comments on the duties involved in each position.

A person must be an active student for the term and level for which the cooperative education job is being entered. Multiple records for the term/level may be entered. The student's record cannot be deleted if cooperative education information exists; the cooperative education record must be deleted first.

Note: Employers entered must exist on the Employer Code Validation Form (STVEMPL).

Banner form



Steps

Follow these steps to add cooperative education information to your student's record.

1. Access the Cooperative Education Form (SGACOOP).
2. Enter the ID of the student in the **ID** field.

   Note: If you have forgotten the ID of your student, click the down arrow to find your student.
3. Select a term in the **Term** field.
4. Perform a **Next Block** function.
5. Select a level code in the **Level** field.
6. Select a code in the **Cooperative Code** field.
7. Select a course registration number for the internship in the **CRN** field.

   NOTE: The section must be one that has a schedule type that permits Co-Ops and the student must already be registered for the section.
8. Enter a start date in the **Begin Date** field.
9. Enter an end date in the **End Date** field.
10. Select an employer code in the **Employer Code** field.
11. Enter a name in the **Contact Name** field.
12. Enter the person's title in the **Title** field.
13. Enter the person's phone number in the **Contact Phone** field.
14. Click the **Save** icon.
15. Click the **Exit** icon.

Creating Communication Plan Information

Purpose

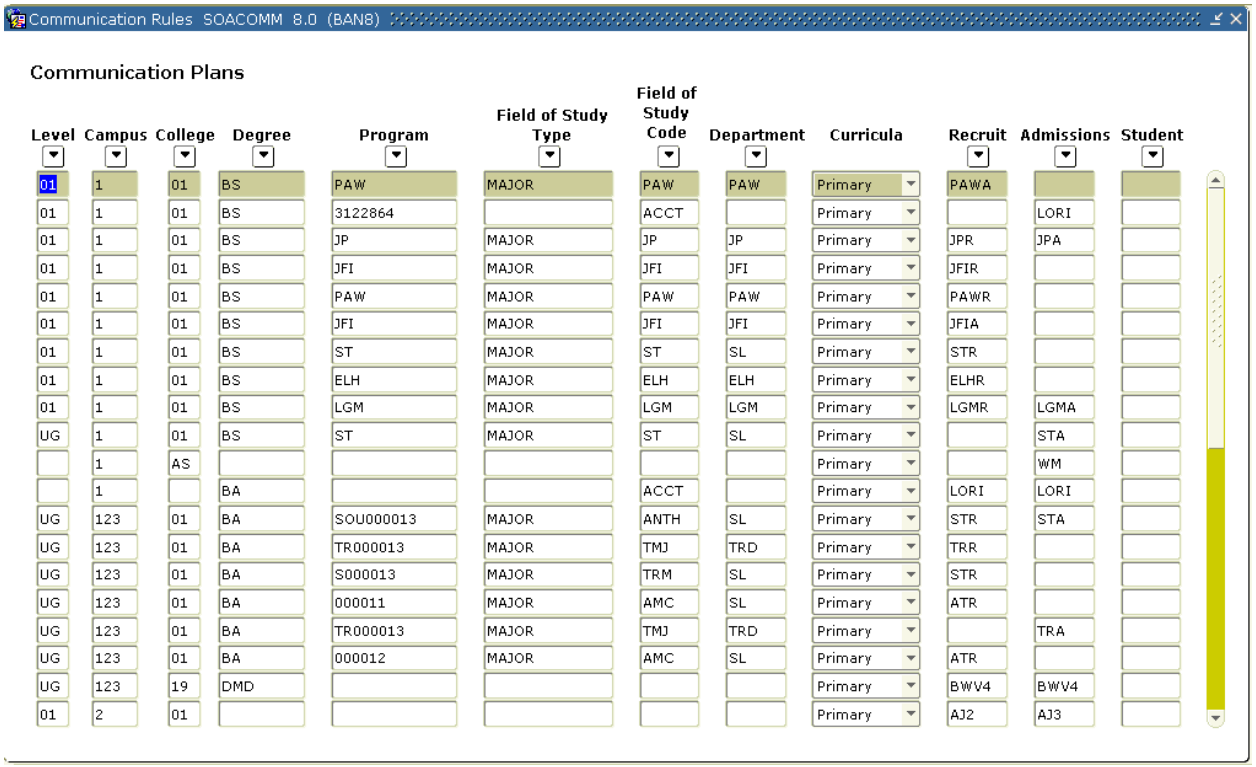
Communication Plans are designed to implement an institution's rules regarding who should receive which materials and when those materials should be sent. A material can be generated (letter or label) or published (department brochures).

The Communication Rules Form (SOACOMM) is used to define the different types of Communication Plans as applied to campus, level, college, and degree, and to define the rules for the automatic assignment of communication plans to people and the processing of the communication plan.

If the campus is X, and the degree level is X, and the college is X, and the degree is X, then under these conditions a specific code is assigned. All students with these characteristics will receive the Communication Plan automatically. If you leave the campus blank, then it is used as a wild card and is applicable on all campuses.

Note: Details about setting up Communications Plans are found in another workbook.

Banner form



Level	Campus	College	Degree	Program	Field of Study Type	Field of Study Code	Department	Curricula	Recruit	Admissions	Student
01	1	01	BS	PAW	MAJOR	PAW	PAW	Primary	PAWA		
01	1	01	BS	3122864		ACCT		Primary		LORI	
01	1	01	BS	JP	MAJOR	JP	JP	Primary	JPR	JPA	
01	1	01	BS	JFI	MAJOR	JFI	JFI	Primary	JFIR		
01	1	01	BS	PAW	MAJOR	PAW	PAW	Primary	PAWR		
01	1	01	BS	JFI	MAJOR	JFI	JFI	Primary	JFIA		
01	1	01	BS	ST	MAJOR	ST	SL	Primary	STR		
01	1	01	BS	ELH	MAJOR	ELH	ELH	Primary	ELHR		
01	1	01	BS	LGM	MAJOR	LGM	LGM	Primary	LGMR	LGMA	
UG	1	01	BS	ST	MAJOR	ST	SL	Primary		STA	
	1	AS						Primary		WM	
	1		BA			ACCT		Primary	LORI	LORI	
UG	123	01	BA	SOU000013	MAJOR	ANTH	SL	Primary	STR	STA	
UG	123	01	BA	TR000013	MAJOR	TMJ	TRD	Primary	TRR		
UG	123	01	BA	S000013	MAJOR	TRM	SL	Primary	STR		
UG	123	01	BA	000011	MAJOR	AMC	SL	Primary	ATR		
UG	123	01	BA	TR000013	MAJOR	TMJ	TRD	Primary		TRA	
UG	123	01	BA	000012	MAJOR	AMC	SL	Primary	ATR		
UG	123	19	DMD					Primary	BWV4	BWV4	
01	2	01						Primary	AJ2	AJ3	

Steps

Follow these steps to define communication plans.

1. Access the Communication Rules Form (SOACOMM).
2. Perform an **Insert Record** function.
3. Select a level code in the **Level** field.
4. Select a campus code in the **Campus** field.
5. Select a college code in the **College** field.
6. Select a degree code in the **Degree** field.
7. Select a program code in the **Program** field.
8. Select a field of study type and code in the **Type** and **Code** fields.

   Example: You might select a type of *MAJOR* and a Code of *ACCT* for a major in Accounting.
9. Select a department code in the **Department** field.
10. Use the drop-down arrow above the **Curricula** field to specify if the curricular elements defined on the rule must come from the primary curriculum record, secondary curriculum record, or any curricula.
11. Select a communication plan code in the **Recruit** field to select a communication plan.
12. Select a communication plan code in the **Admissions** field to select a communication plan.
13. Select a communication plan code in the **Student** field to select a communication plan. For the purposes of the General Student manual, only those communication plans that are defined for Student will be triggered when the SGASTDN record reflects the criteria from all of the other fields.
14. Click the **Save** icon.
15. Click the **Exit** icon.

Viewing a Student's Information

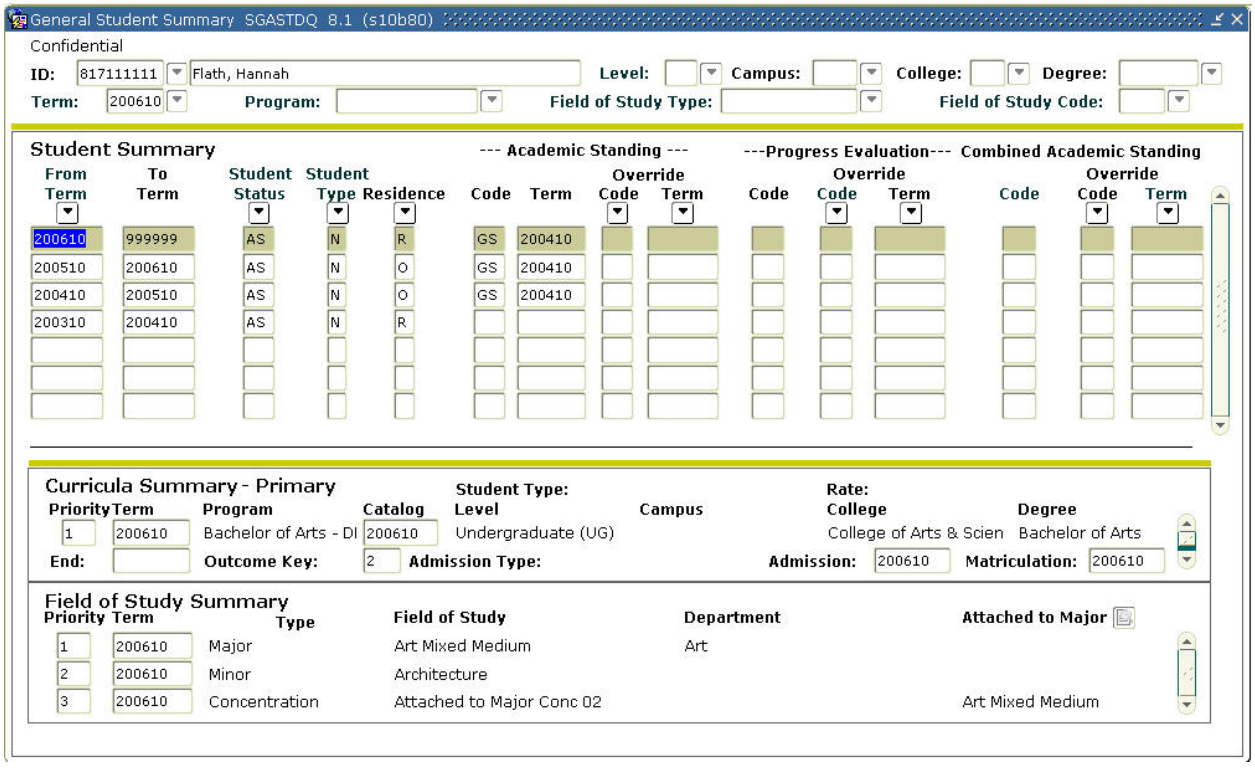
Purpose

The General Student Summary Form (SGASTDQ) is a stand-alone query form that displays all general student records on file for a student from the term represented in the Key Information. The person must be a student to be queried on this form. If a term is entered in the Key Information, those general student records with a term that is earlier in time or is equal to the term in the Key Information will be displayed. If no term is entered in the Key Information, all of the student's General Student records will be represented on the form back to the earliest record on file.

When working in the Student Information section of SGASTDQ, the user may perform a Count Query Hits function from any existing record to transfer to the General Student Form (SGASTDN). The user will view the record on SGASTDN that matches the record on which the cursor was placed in SGASTDQ when the function was performed.

When the General Student Summary Form is accessed from the Committee/Service Form (SHACOMI), the user may perform a Select function to drag back information for college and department to SHACOMI.

Banner form



Steps

Follow these steps to view your student's information.

1. Access the General Student Summary Form (SGASTDQ).
2. Enter the ID of the student in the **ID** field.

   Note: If you have forgotten the ID of your student, click the down arrow to find your student.

3. Enter a term in the **Term** field.

   Note: The query will return information for the term you entered plus any previous terms that contain information for this student. You can enter information in the other fields in the key block to narrow your search results.

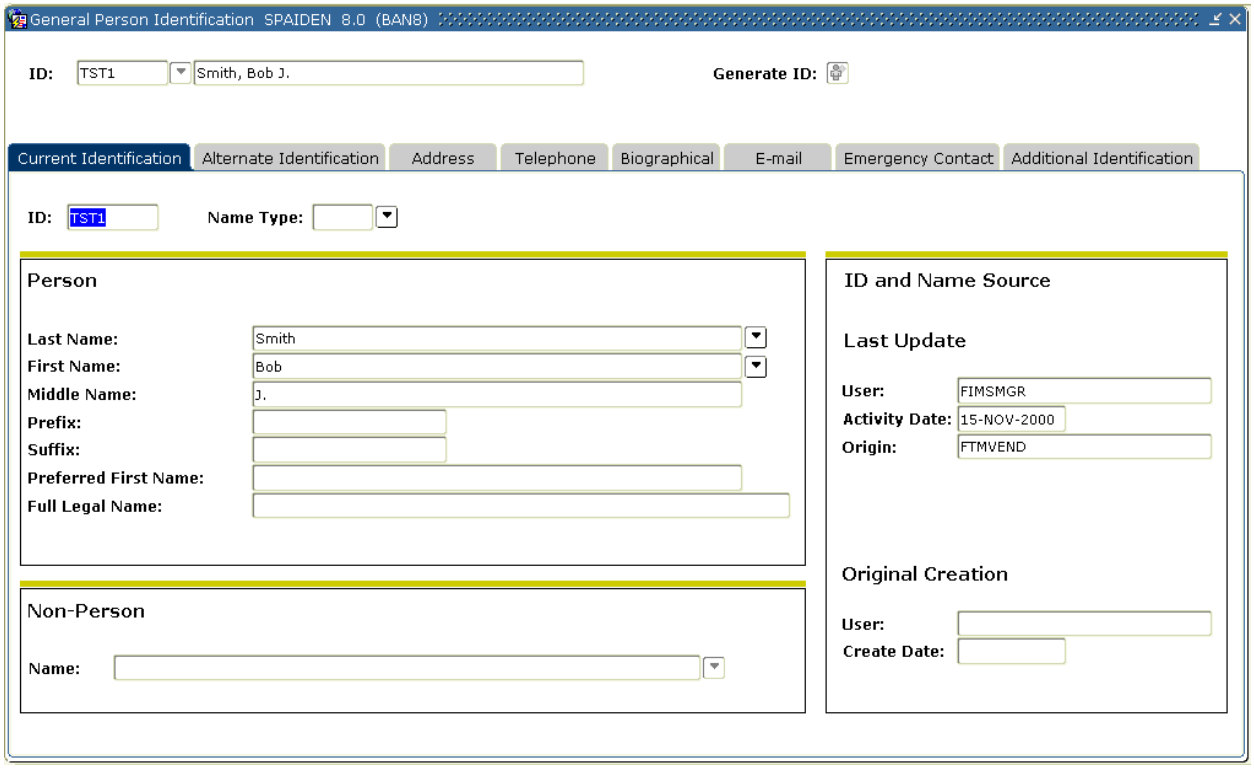
4. Perform a **Next Block** function.
5. Use the scroll bar, if necessary, to review the student's record.
6. Select **Detailed Student Information** from the **Options** menu to access the General Student Form (SGASTDN).
7. Click the **Exit** icon to return to the General Student Summary Form (SGASTDQ).
8. Click the **Exit** icon.

Entering Guardian Information

Introduction

To enter guardian information, you must first enter the guardian on the General Person Identification Form (SPAIDEN), and then assign the guardian to a student using the Guardian Information Form (SOAFOLK).

Banner form



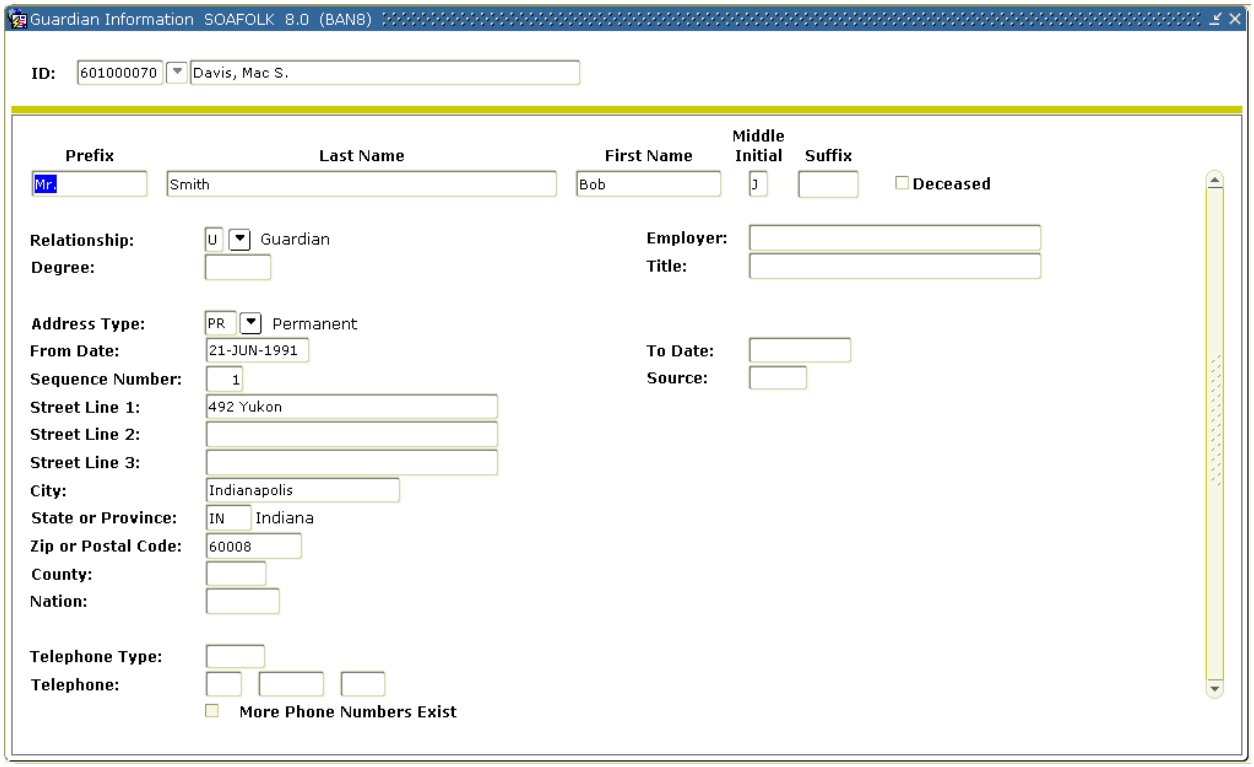
Steps

Follow these steps to enter guardian information.

1. Access the General Person Identification Form (SPAIDEN).
2. Enter the ID of the student in the **ID** field.

   Note: If you have forgotten the ID of your student, click the down arrow to find your student.
3. Select the **Address** tab.
4. Enter a date in the **From Date** field.
5. Select an address type representing Parents in the **Address Type** field.
6. Enter an address in the **Street Line 1** field.
7. Enter a city in the **City** field.
8. Enter a state or province in the **State or Province** field.
9. Enter a zip or postal code in the **Zip or Postal Code** field.
10. Select a telephone type in the **Telephone Type** field.
11. Enter telephone number in the **Telephone** field.
12. Click the **Save** icon.
13. Click the **Exit** icon.

Banner form



Steps

Follow these steps to complete the process using the Guardian Information Form (SOAFOLK).

1. Access the Guardian Information Form (SOAFOLK).
2. Enter the student's ID number in the **ID** field.

   Note: If you do not know the student ID number, you can select the down arrow in the **ID** field to perform a query using the student name.
3. Enter the prefix of the guardian in the **Prefix** field.

   Example: *Mr.*, *Ms.*, *Mrs.*, *Pastor*
4. Enter the last name of the guardian in the **Last Name** field.
5. Enter a name in the **First Name** field.
6. Select the **Deceased** checkbox if the guardian is deceased.
7. Select a relationship type in the **Relationship** field.

8. Enter values, if applicable, in the **Degree**, **Employer**, and **Title** fields.

   Note: These fields can be left blank if information is not requested or is not available.

9. Enter the address type representing Parents in the **Address Type** field.

   Result: The student's address information defaults from the student file.

10. Click the **Save** icon.

11. Click the **Exit** icon.

Maintaining Sports Records

Purpose

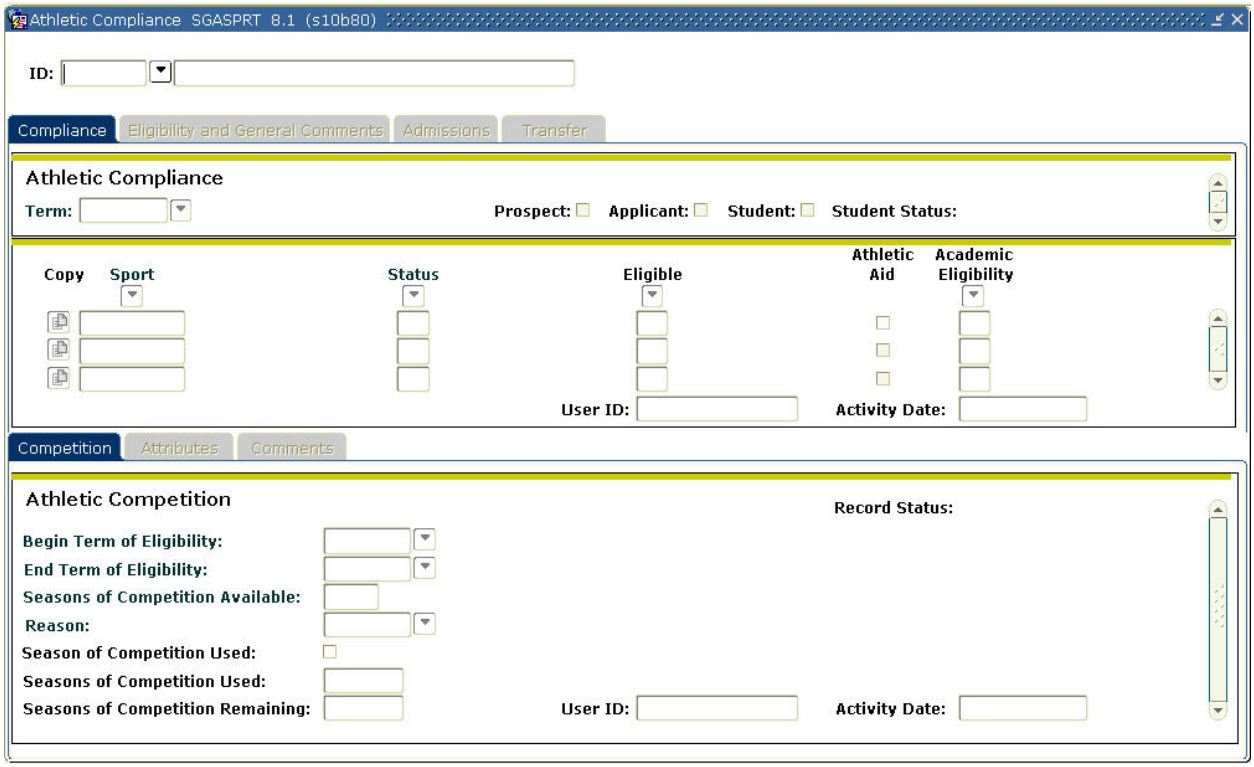
Use the Athletic Compliance Form (SGASPRT) to assign sport codes, status, athletic eligibility, academic eligibility, and athletic aid information by term to an athlete. An athlete needs at least a general person record (SPRIDEN) in order to be processed on this form. If your institution requires that an athlete with a compliance (sport) record have an associated general student record (SGBSTDN), you can do so. A student status is displayed for the record for the term, for an ID with a general student record.

Compliance records can be created and modified for any term and are not required to have associated competition data. Compliance records can be modified in any term, regardless of the existence of competition data. They can also be modified if the athlete is deceased. Compliance records without competition data can be copied to a future term.

On this form you can also maintain eligibility information, enter general comments, and review admissions and transfer data by using the form tabs.

Note: Please refer to the Banner Student Athletic Compliance Workbook for more details about the Athletic Compliance form, associated processes, and the additional new forms supporting the functionality.

Banner form



Steps

Follow these steps to enter compliance records without competition data. You can enter compliance (sport) records without athletic competition data, athletic attributes, or athletic comments.

1. Access the Athletic Compliance Form (SGASPRT).
2. Enter the ID for the athlete in the **ID** field in the Key Block.
3. Perform a **Next Block** function to the Athletic Compliance Term block.
4. Enter the term for the athletic compliance record in the **Term** field.
5. Review if the person has a prospect, applicant, or general student record for the term.

   Note: If a general student record exists, review the student status.
6. Perform a Next block to the Athletic Compliance Sport block.
7. Enter the sport code in the **Sport** field for the sport in which the athlete is participating.
8. Enter the status code for the athlete in the **Status** field.

9. Enter the eligibility code for the athlete in the **Eligible** field.
10. Click the **Athletic Aid** checkbox if the athlete is receiving athletic aid.
11. Enter the academic eligibility code for the athlete in the **Academic Eligibility** field.
12. Click the **Save** icon to save the record.
13. Click the **Exit** icon if you are not going on to the next exercise.

Maintaining and Monitoring Student Right to Know Reporting

Introduction

The Student Right to Know act proposes regulations that require an institution of higher education to disclose information about its student body's completion or graduation rates. This act expands the types of "consumer" information that institutions are required to disclose to current and prospective students through appropriate publications and mailings.

Institutions are required to report a completion or graduation rate for full-time certificate-seeking or degree-seeking undergraduate students. Also, institutions that award athletically related student aid are required to report completion or graduation rates of various student populations at the institution, including student athletes. If an institution cannot calculate the graduation rate of the most recent cohort of students that has had an opportunity to graduate, the institution would report a persistence rate until it can disclose an actual graduation rate of an entering cohort of students. This statute requires an institution to make these disclosures to current and prospective students by July 1, 1993, and annually thereafter.

The legislation

For references to the "Legislation" in this procedure, refer to the Notice of Proposed Rule Making that was published in the July 10, 1992 Federal Register. It is recommended that you read either this information or the Chapter 12 General Student Dear Colleague Letter from the US Department of Education dated August 21, 1991 before this processing is implemented.

Sports that require reporting

If your institution awards athletically-related financial aid, your institution is required to report the graduation rates of certain groups of student athletes in addition to the required institution-wide graduation rate.

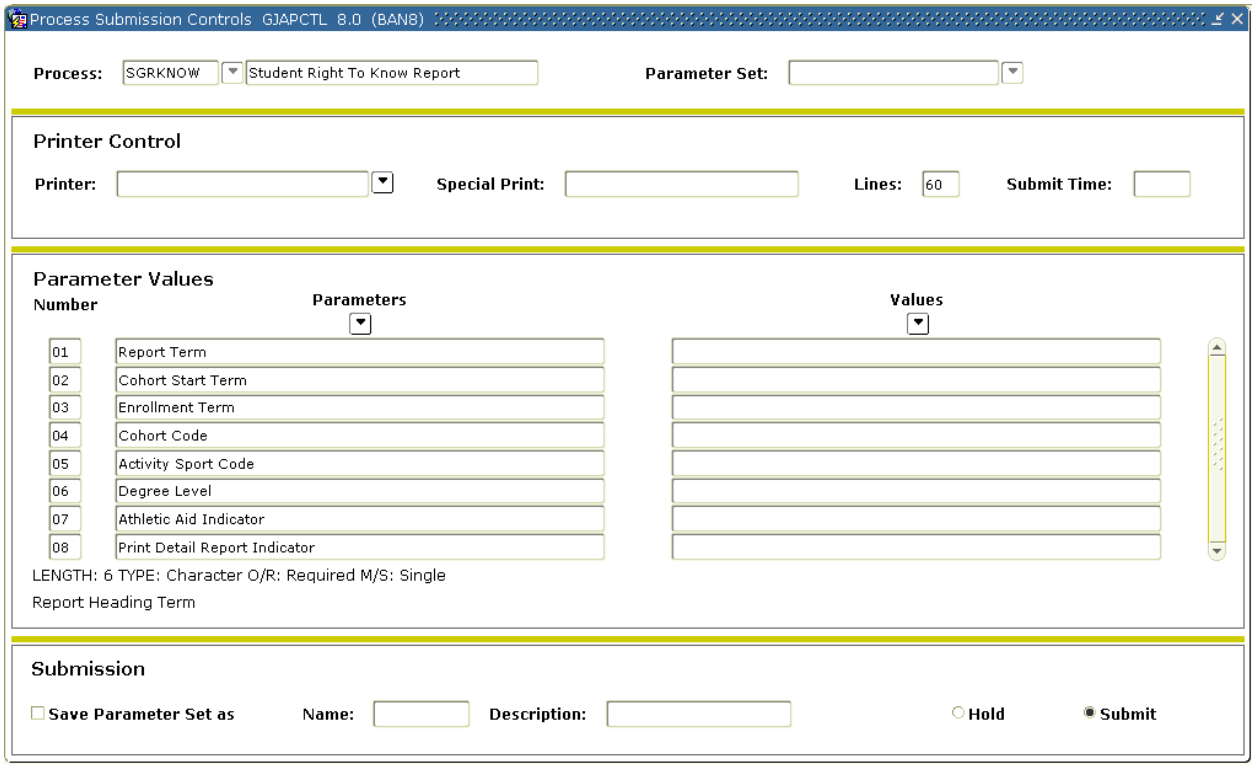
The sports in which the graduation rates of student athletes must be tracked are

- basketball
- baseball
- football
- cross country/track
- all other sports combined.

Purpose

The Student Right To Know Report (SGRKNOW) is used to produce data that will assist your institution in calculating graduation and completion rates by cohort and optionally by sport codes. If sport reporting is used, those students who receive athletically based financial aid may be specifically selected to be processed by sport.

Banner form



Steps

Follow these steps to run the Student Right To Know Report.

1. Access the Student Right To Know Report (SGRKNOW).
2. Enter the desired printer name in the **Printer** field.

   Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Req'd?	Parameter	Value
✓	Report Term	Enter the term in which you are running the report.
✓	Cohort Start Term	Enter the start term of the cohort codes to be processed.

Req'd?	Parameter	Value
	Enrollment Term	Enter the term in which students must have enrollment to be counted as a cohort.
✓	Cohort Code	Enter the code(s) processed to those specified with a matching start term. A wildcard (*%*) will process all cohort codes with a matching start term.
	Activity Sport Code	Enter the sport activity code(s) to be processed for each cohort code. Enter a wildcard (*%*) to process all sport activity codes.
✓	Degree Level	Enter the cohort code(s) to be processed to match the degree level as specified on the Cohort Code Validation Form (STVCHRT), or a wildcard (*%*) may be entered to process all degree levels.
	Athletic Aid Indicator	Enter *Y* to select only those students with the sport code(s) to be processed where the Athletic Aid Indicator for the sport code is checked.
	Print Detail Report Indicator	Enter *Y* to print a detailed listing of students in each category.

4. Click the **Save Parameter Set as** checkbox if you want to save the parameter set for future use enter a name and description in the **Name** and **Description** fields.

5. Click the **Submit** radio button.

6. Click the **Save** icon to execute the report.

   Result: The Auto hint line displays the job submission number for the report log and list file.

7. Select **Review Output** on the **Options** menu to review the report.

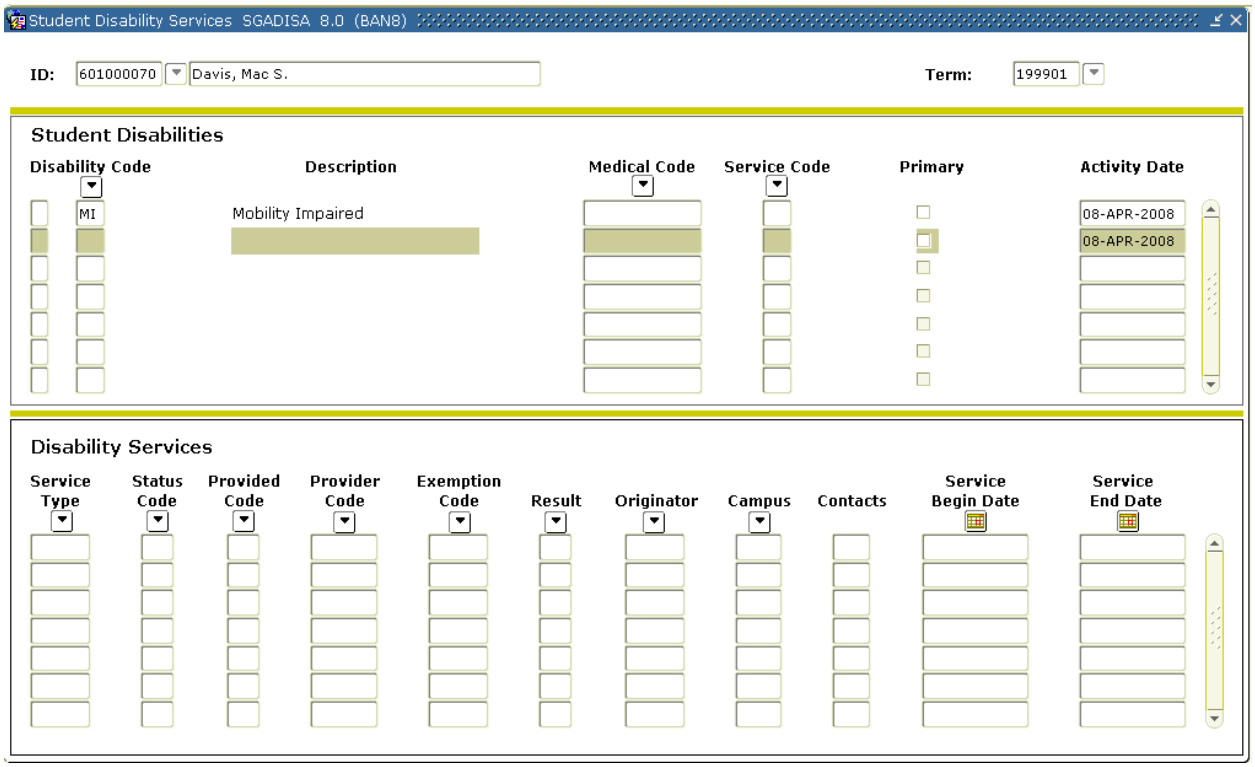
8. Click the **Exit** icon.

Entering Disability Information

Purpose

The Student Disability Services Form (SGADISA) is used to capture information about disabilities, as well as services provided for those disabilities, for a student on a term-by-term basis. A student record must exist for the student on the General Student Form (SGASTDN) for the term specified.

Banner form



Steps

Follow these steps to enter disability information.

1. Access the Student Disability Services Form (SGADISA).
2. Enter the student's ID in the **ID** field.
3. Enter the current or appropriate term in the **Term** field.
4. Perform a **Next Block** function.
5. Enter the disability code associated with the Student's disability in the **Disability Code** field.

   Note: The code comes from the Disability Type Code Validation Form (STVDISA) and the description will default into the **Description** field.

6. Enter the appropriate medical code in the **Medical Code** field.

   Note: This code comes from the Medical Code Validation Form (STVMEDI).

7. Enter the service code in the **Service Code** field.

   Note: This code comes from the Disability Service Validation Form (STVSPSR).

8. If appropriate, select the **Primary** checkbox to indicate that this is the primary disability.
9. Click the **Save** icon.
10. Perform a **Next Block** function.
11. Complete the fields in the Disability Services block as appropriate. Use the following as a guide to the fields.

    Note: Not all these fields are entered with data at the same time; various fields will be updated with information as that information becomes available

Field	Description
Service Type	Indicates the type of service provided by the institution for the disability.
Status Code	Indicates the status of the service type provided.
Provided Code	Indicates whether the service type been provided by the Institution.

Field	Description
Provider Code	Indicates who or what provided the service.
Exemption Code	Indicates whether the student is exempt from having the service provided.
Result	Result of the Service Type that was provided.
Originator	Originator of the Disability Services record.
Campus	Campus at which the student is enrolled.
Contacts	Number of times the Originator has had contact with the student.
Service Begin Date	Date that service is to take effect.
Service End Date	End date of the service.

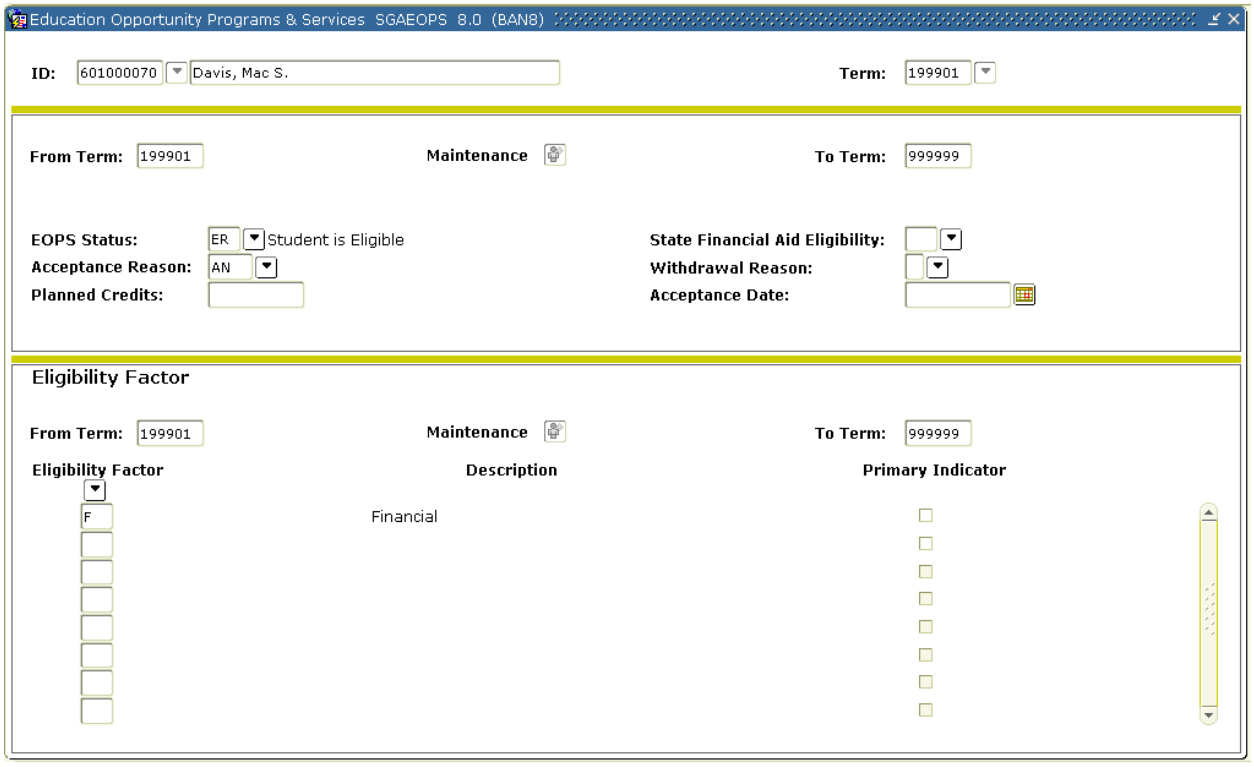
12. Click the **Save** icon.
13. Click the **Exit** icon.

Entering EOPS Information

Purpose

The purpose of the Education Opportunity Programs and Services Form (SGAEOPS) is to record and monitor the EOPS information for a student based on an effective term. EOPS status and multiple eligibility factors may be specified for a student. A general student record must exist on SGASTDN prior to creating or updating the EOPS information.

Banner form



Steps

Follow these steps to enter EOPS information.

1. Access the Education Opportunity Programs and Services Form (SGAEOPS).
2. Enter the student's ID in the **ID** field.
3. Enter the appropriate term in the **Term** field.
4. Perform a **Next Block** function.

   Note: The **Maintenance** icon is used to copy the record to a new Effective Term because more information is available for that new term, and the record needs to be updated. You can also use this icon to set the End Term of the record.

5. Enter the student's EOPS status in the **EOPS Status** field.
6. Enter the student's eligibility for state financial aid in the **State Financial Aid Eligibility** field.
7. Enter the reason for acceptance in the **Acceptance Reason** field.
8. Enter a withdrawal reason in the **Withdrawal Reason** field, if applicable.
9. Enter the planned credits in the **Planned Credits** field.
10. Enter an acceptance date in the **Acceptance Date** field.
11. Perform a **Next Block** function to access the Eligibility Factor block.
12. Enter the appropriate code in the **Eligibility Factor** field.

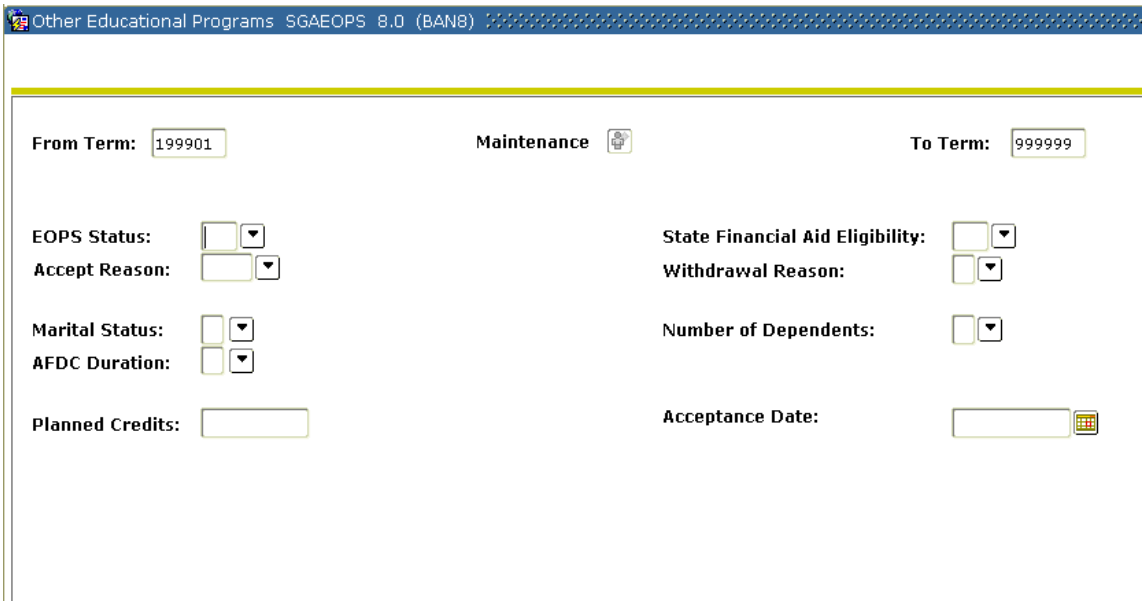
    Result: The description will default into the **Description** field.

13. Select the **Primary Indicator** checkbox, if appropriate.

    Note: This checkbox indicates whether the eligibility factor is the primary eligibility factor, or the primary reason for needing the Educational Opportunity Program.

14. Select **Other Educational Programs** from the **Options** menu to access the Other Educational Programs window.

    Note: This window allows you to capture Educational Opportunity Program information for two different programs. Not all fields are required, and can be entered as the information is received.



15. Enter the student's EOPS status in the **EOPS Status** field.
16. Enter the student's eligibility for state financial aid in the **State Financial Aid Eligibility** field.
17. Enter the reason for acceptance in the **Accept Reason** field.
18. Enter a withdrawal reason in the **Withdrawal Reason** field, if applicable.
19. Enter the student's marital status in the **Marital Status** field.
20. Enter the student's number of dependents, if applicable, in the **Number of Dependents** field.
21. Enter the code for the AFDC duration time in the **AFDC Duration** field.
22. Enter the student's planned credits in the **Planned Credits** field.
23. Enter an acceptance date in the **Acceptance Date** field.
24. Click the **Save** icon.
25. Click the **Exit** icon.

Maintaining Required Information

Purpose

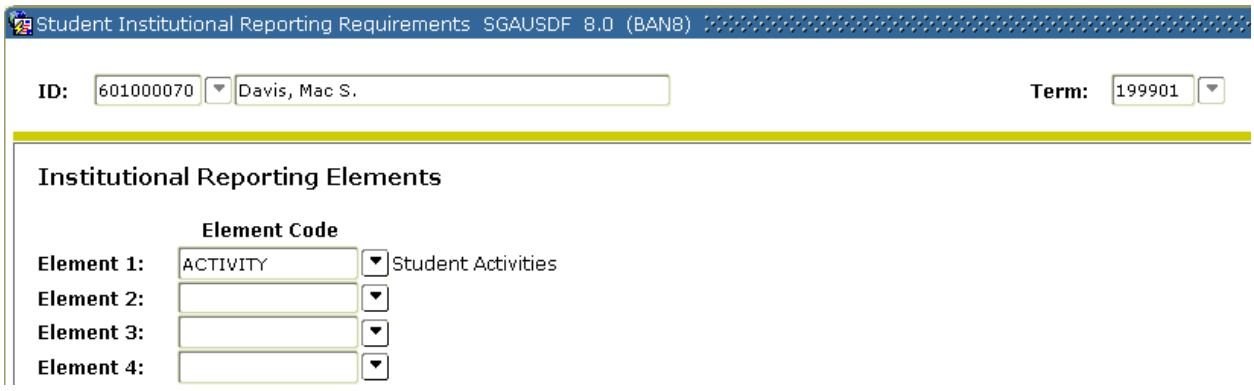
The Institutional Reporting Requirements Form (SGAUSDF) is used to maintain information about students which is specifically required by the institution on a term-by-term basis. This form and the supporting validation forms allow an institution to determine which additional data must be maintained regarding the student.

Each of the reporting elements numbered 1 - 10 is supported by a Student Element (Number) Validation Form (STVSUDA through STVSUDJ) which is used to create, update, insert, and delete institutionally specific information. Element 1 values are derived from the Student Element One Validation Form (STVSUDA), Element 2 values are derived from the Student Element Two Validation Form (STVSUDB), and Element 3 values are derived from the Student Element Three Validation Form (STVSUDC), and so on through Element 10 and the Student

Element Ten Validation Form (STVSUDJ).

Note: A general student record must exist on the General Student Form (SGASTDN) for the student during the term before information is entered on this form.

Banner form



Steps

Follow these steps to use the Institutional Reporting Requirements Form (SGAUSDF).

1. Access the Institutional Reporting Requirements Form (SGAUSDF).
2. Enter the student's ID in the **ID** field.
3. Enter the appropriate term in the **Term** field.
4. Perform a **Next Block** function.
5. Enter the appropriate codes in the **Element** field for **Element 1** through **Element 10**, as appropriate.

Performing Purge Processes

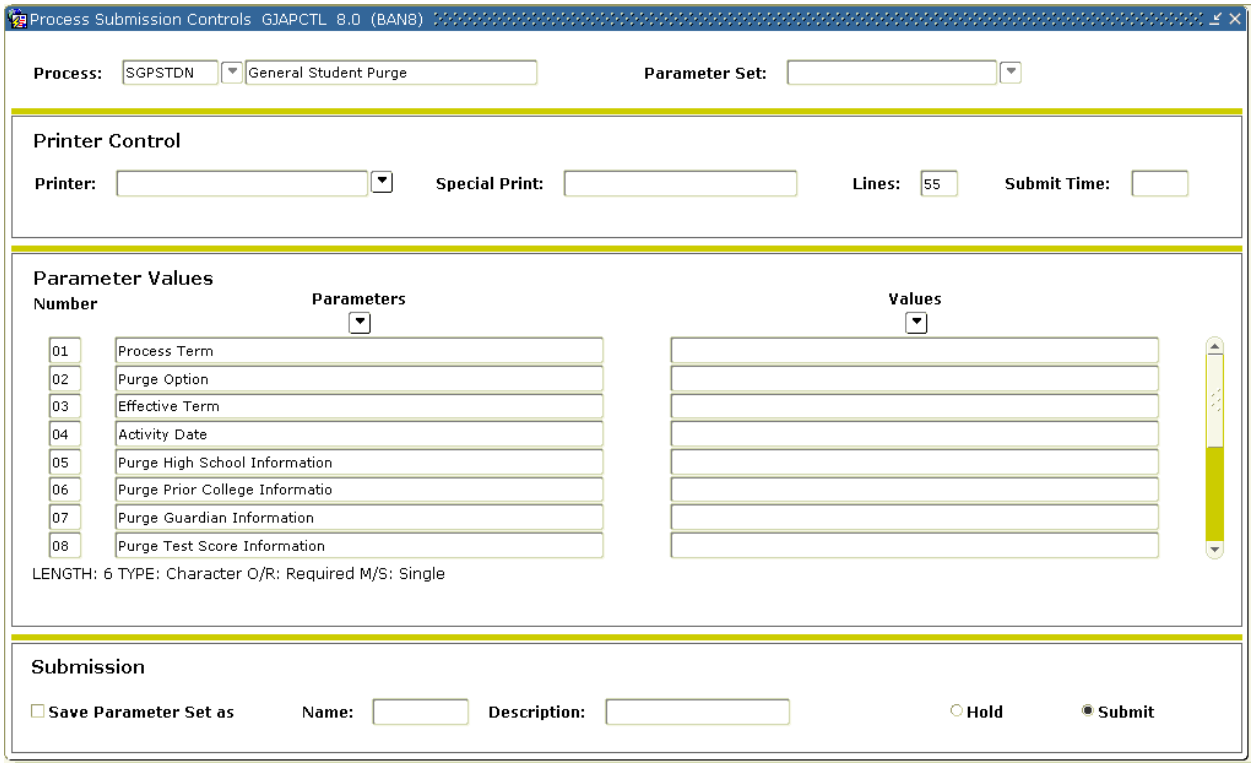
General Student Purge Purpose

The General Student Purge Process (SGPSTDN) purges the general student information for a student who never registered based on the user-specified effective term and activity date. You can choose to leave the High School, Prior College, Guardian, Test Score, and Hold information on the database also by parameter selection.

General Student information will not be purged if

- the student has any active holds
- the student has Academic History information
- the student has any Financial Aid information.

General Student Purge Banner process



General Student Purge Steps

Follow these steps to run the general student purge.

1. Access the General Student Purge Form (SGPSTDN).

2. Enter the desired printer name in the **Printer** field.

   Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

3. Enter these parameter values.

Parameter	Description
Process Term	Enter the term that you want to process. This parameter is required.
Purge Option	Choose from one of the two purge options listed in the description: Purges general student records never registered by term or by term and date.
Effective Term	Enter a term for which you want this process to be effective.
Activity Date	Enter date, two digit day-three character month-four digit year.
Purge High School Information	Enter *Y* for Yes or *N* for No.
Purge Prior College Information	Enter *Y* for Yes or *N* for No.
Purge Guardian Information	Enter *Y* for Yes or *N* for No.
Purge Test Score Information	Enter *Y* for Yes or *N* for No.
Purge Hold Information	Enter *Y* for Yes or *N* for No.
Run Mode	Enter *A* for audit mode or *U* for update mode. This parameter is required.

4. Click the **Save Parameter Set as** checkbox if you want to save the parameter values for future use.

5. Enter a name and description in the **Name** and **Description** fields.

6. Click the **Submit** radio button.

7. Click the **Save** icon to execute the report.

   Result: The Auto hint line displays the job submission number for the report log and list file.

8. Select **Review Output** on the **Options** menu to review the report.

9. Click the **Exit** icon.

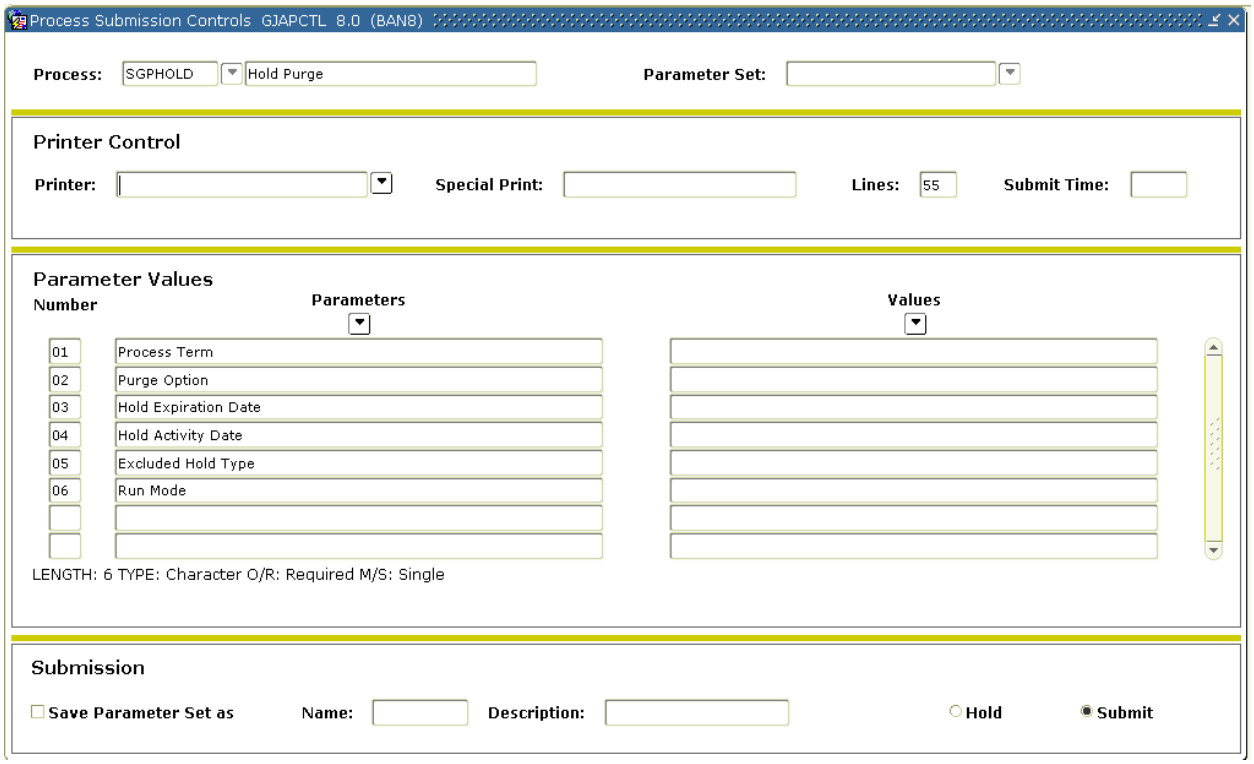
Hold Purge Process Purpose

The Hold Purge Process (SGPHOLD) purges all expired holds based on the user specified parameters of expiration date, activity date, and hold type. You can choose one of two options:

- Option 1: hold expiration date (date must exist to be purged)
- Option 2: hold activity date

Warning: Only the Registrar should be permitted to run the process to purge all expired holds. The purge process is run before the start of registration for the Fall, Spring, and Summer terms.

Hold Purge Process Banner process



Hold Purge Process Steps

Follow these steps to run the hold purge process.

1. Access the Hold Purge Form (SGPHOLD).
2. Leave the **Parameter Set** field empty.
3. Perform a **Next Block** function to access the Printer Control Block.
4. Double-click in the **Printer** field and select an available printer.

   Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

5. Perform a **Next Block** function to navigate to the Parameter Values block.

   Note: The system will automatically populate any default parameters.

6. Enter the appropriate values for each parameter in the **Values** column.

   Note: Use the Values **Search** icon to access tables with appropriate values.

Parameter	**Value**
Process Term	Enter the term code associated with the process. This is a required parameter.
Purge Option	Choose from one of the two purge options listed in the description: hold expiration date or hold activity date. This is a required parameter.
Hold Expiration Date	Holds with end date less than or equal to the date entered will be purged.
Hold Activity Date	Holds with activity dates that match the date entered will be purged.
Excluded Hold Type	Hold types specified will be excluded from the purge process. Multiple requests are permitted.
Run Mode	Enter *A* to produce a listing of all selected purge data without affecting the database. Enter *U* to update the database after purging the selected data. This is a required parameter.

7. Check the **Save Parameter Set as** checkbox if you want to save the parameter values

for future use.

8. Enter a name and description for your job parameters in the **Name** and **Description** fields.

   Note: Run the process in Update Mode.

9. Select the **Submit** radio button.

10. Click the **Save** icon.

11. Click the **Exit** icon.

General Student Mass Entry

Overview

Mass entry processing is based on user-defined search and update criteria. Users can select students based on form search criteria and update their data based on the update criteria. The selected students can be reviewed and the updates selectively processed. Updates can be processed immediately or held for later processing in job submission using a batch process (SORMEBP). A Results tab is used to view processing results for Mass Entry, whether the results are processed immediately or via batch. Audit information is retained for each Mass Entry process, and may later be purged. Data retained includes User ID, date, timestamp, search criteria, update criteria, students that were processed and the results. Mass entry forms may also be used to query student information only, in which case audit results are not retained.

The General Student Mass Entry Form (SGAMSTU) is used for mass entry general student processing. You can search and update general student records using SGAMSTU when a general student record exists for the student on SGASTDN for the effective term that is entered in the search criteria. The effective term is required when any other search criteria are entered in order to proceed to the Results tab.

Updates can be selected for the processing term on the Update tab. Updates take place for new and existing student records, if they satisfy the search criteria, regardless of any holds the students may have.

The search results are displayed by ID and name based on the data required by the mass entry form, the search criteria, and the population selection, if used. All records returned in the Results tab can be selected for update, all deselected, or not selected. Individual records can be selected for update. Records may be added or deleted manually.

When no search criteria are entered, you can still manually enter students for update. Records that are manually entered require that the student has a general student record and a valid effective term. Updates cannot be performed when the student has a registration record for the update criteria learner effective term. Mail submission is also not updated when a student has a registration record for the search criteria effective term.

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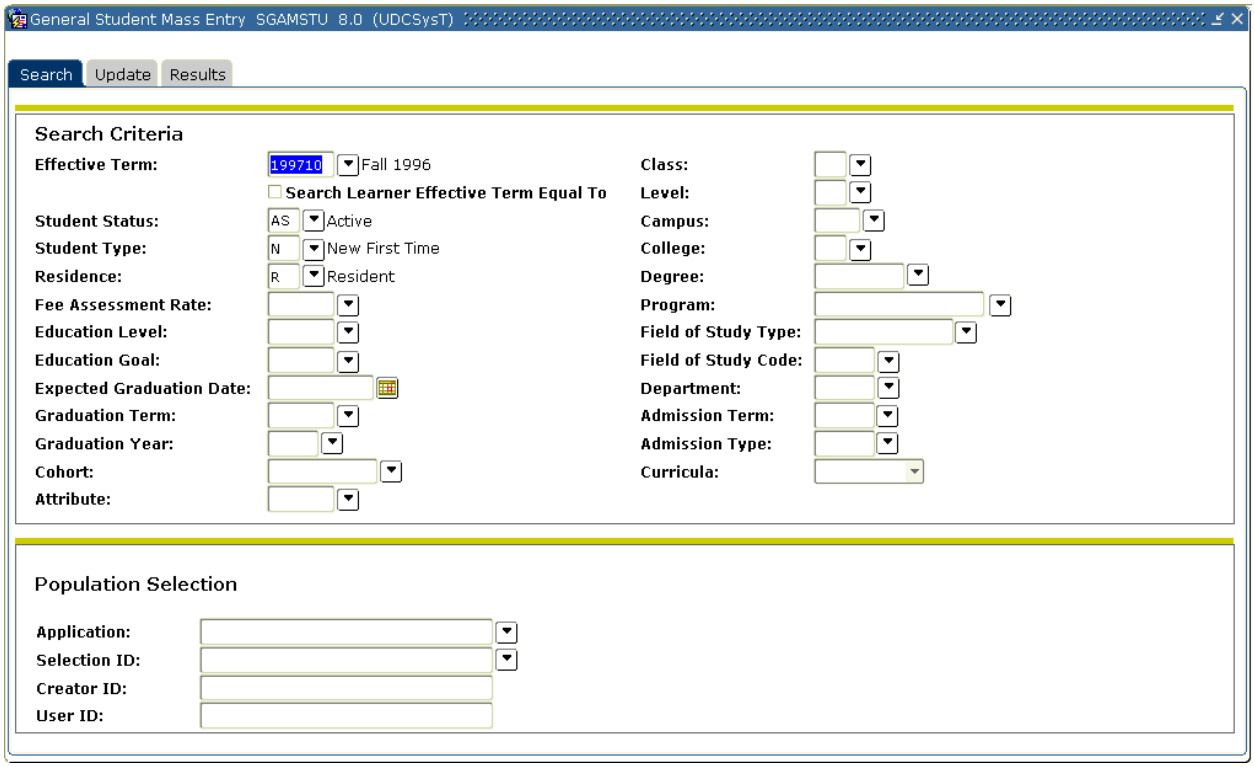
Banner Form



Steps

Follow these steps to execute the General Student Mass Entry process.

1. Access the General Student Mass Entry form (SGAMSTU).

2. Search for and enter all the criteria for your search in the Search Criteria section of the form. Please note that results will only be returned for Students whose records meet the search criteria on this form AND who have an existing General Student record (SGASTDN). Effective Term is the only required field.

   Note: A new record will be created with a new Effective Term code.

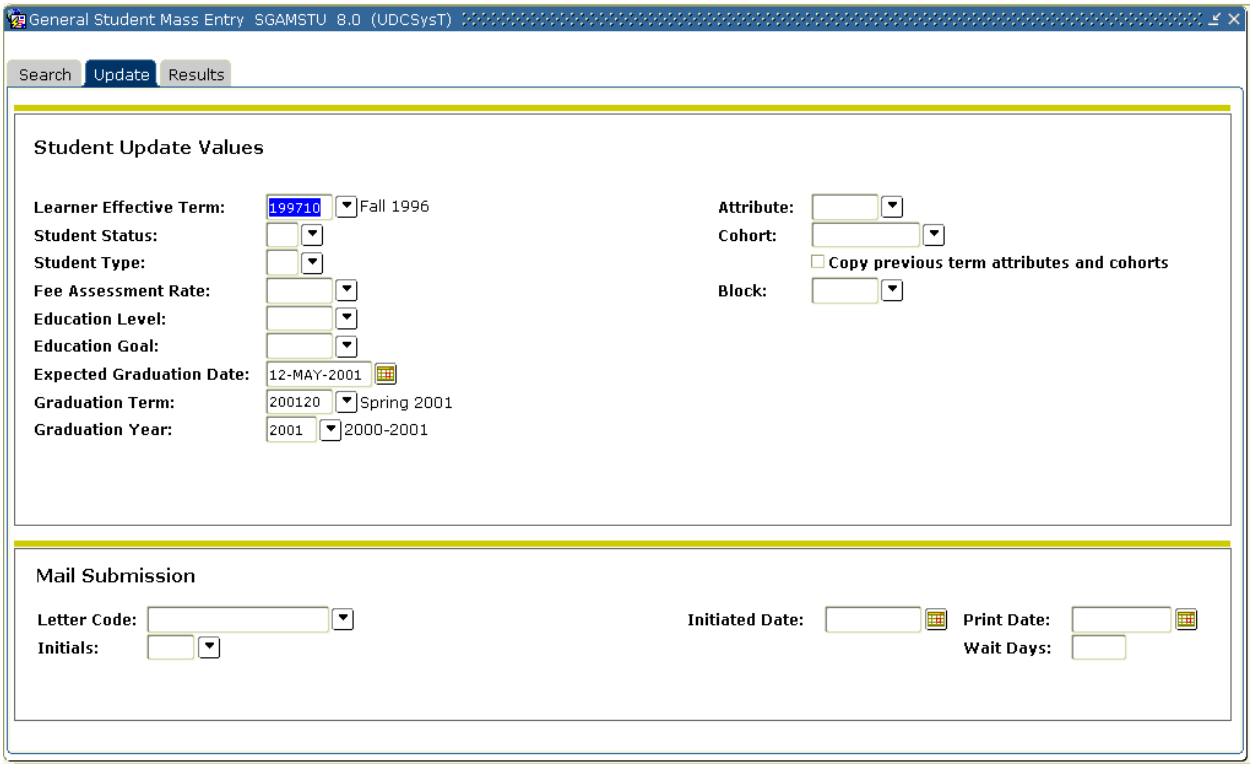
3. Optionally, you may fill in the Population Selection section of the form. This is not another block, it is accessed by pressing the **Tab** key to move to the next form field.

   Note: Familiarity with Population Selection is a prerequisite for this course.

4. Press **Next Block** or the **Update** tab to move to the **Update** tab.

5. Enter the General Student Update values desired.

   NOTE: A term code is required for all general student updates.

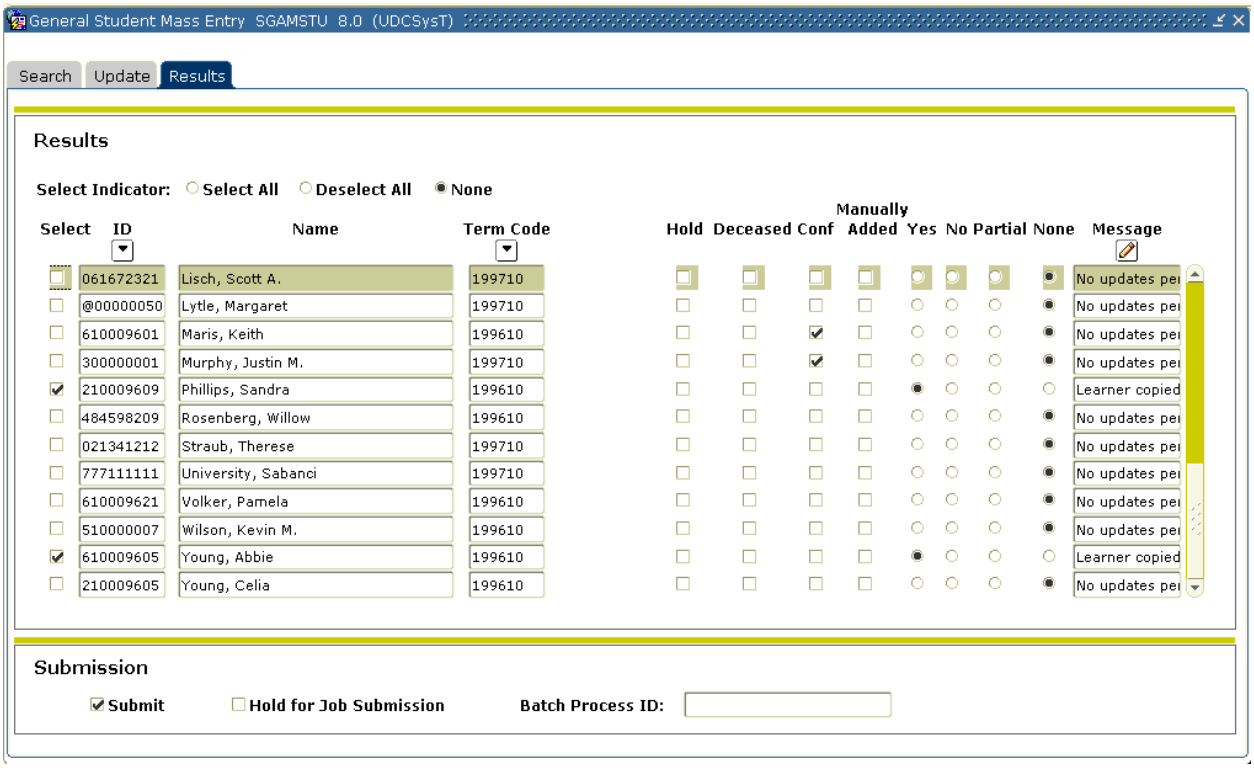


Note: These updates will be applied to the General Student record (SGASTDN).

6. After filling in the updated values, you may optionally update the Communication Plan for all of the selected student records by filling in the Mail Submission section of the form. This is not a separate Block, but is accessed by pressing **Tab** to move to the next form field.

7. Press **Next Block** or click on the *Results* tab to move to the *Results* Tab. All records that satisfy the requirements specified in the Search Tab, and that have an existing General Student record (SGASTDN) are listed. You can review the selected records on this Tab and select All, None or some subset of these records for processing.

   Note: Records may be manually entered on this tab, and selected for update. They will be updated if they have an existing General Student record (SGASTDN).


General Student Mass Entry SGAMSTU 8.0 (UDCSysT)
Search
Update
Results
Results
Select Indicator: Select All Deselect All None
Select ID Name Term Code Manually Added Hold Deceased Conf Yes No Partial None Message
061672321 Lisch, Scott A. 199710 No updates pe
@00000050 Lytle, Margaret 199710 No updates pe
610009601 Maris, Keith 199610 No updates pe
300000001 Murphy, Justin M. 199710 No updates pe
210009609 Phillips, Sandra 199610 Learner copied
484598209 Rosenberg, Willow 199610 No updates pe
021341212 Straub, Therese 199710 No updates pe
777111111 University, Sabanci 199710 No updates pe
610009621 Volker, Pamela 199610 No updates pe
510000007 Wilson, Kevin M. 199610 No updates pe
610009605 Young, Abbie 199610 Learner copied
210009605 Young, Celia 199610 No updates pe
Submission
Submit
Hold for Job Submission
Batch Process ID:

8. To execute the Mass Entry for General Student immediately, select the Submit check box, as shown above. To execute it later as a Batch Process, select the Hold for Job Submission check box. Please see the section *Mass Entry Batch Update* in this workbook for more information about running the Mass Entry Batch process.

9. Click the **Save** icon to execute the process.

10. Once the process has been executed, the results are displayed on this tab. Each record is displayed with status indicators and a message type which contains more information for each record's update results.

Indicator	Description
Manually Added	Checked when the record has been manually added to the selected group for update.
Yes	Checked when the update has been completed successfully.
No	Checked when the update has not been completed at all.
Partial	Checked when one part of the update was successfully completed while another part was not.
None	Checked when the update was not attempted, (such as if the record was not selected).

Indicator	Description
Message	A link to a message explaining the status of the update for that record.

11. Click the **Exit** icon.

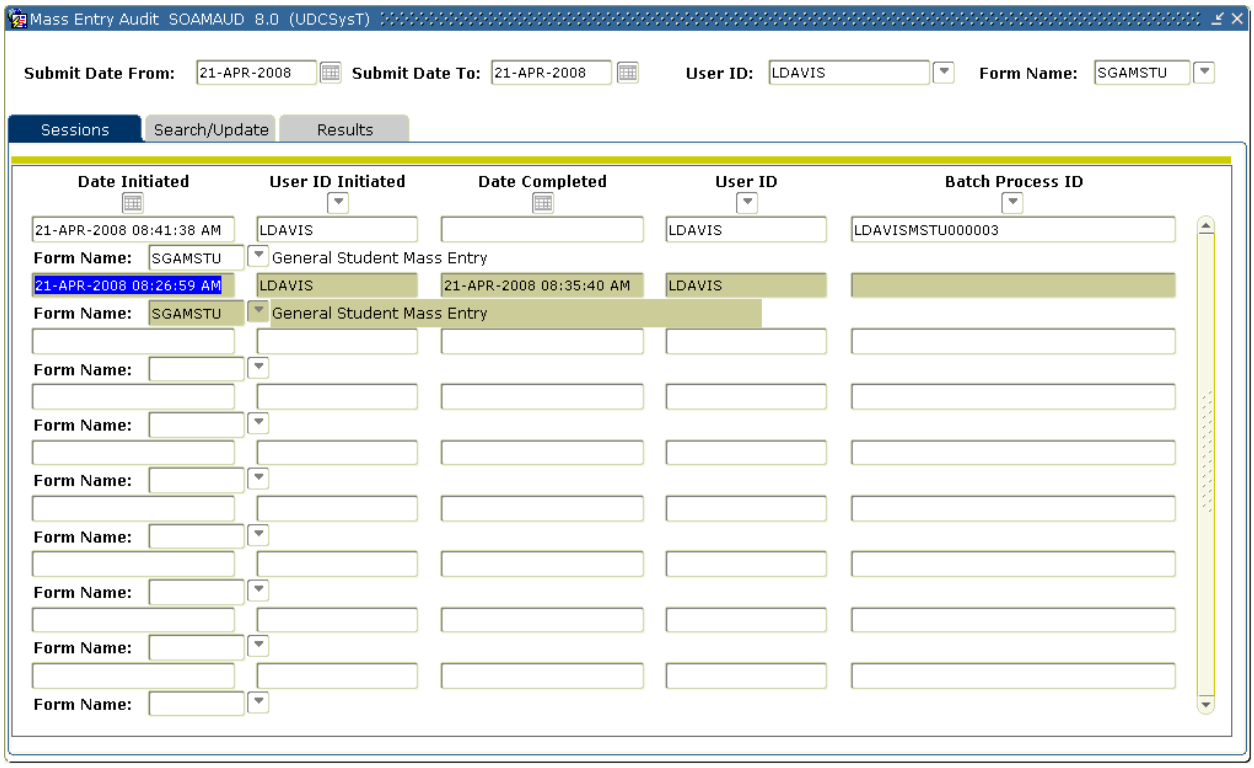
Mass Entry Audit

Overview

Whenever the Mass Entry process executes, an audit file is saved, capturing all of the information on the Search/Update tabs and the Results tab for each Mass Entry executed. These files can be reviewed by opening this Mass Entry Audit form (SOAMAUD). This form is used to query mass entry event information by session.

These files can be searched by Date, User ID and/or Form Name. The list of saved audit files that satisfy the search criteria entered are displayed on the Sessions Tab. You can then view the selected session's associated search criteria and updated and inserted values in the Search/Update tab. Depending on whether the updates have been processed directly on the mass entry form or by batch processing (SORMEBP), the processing results can be displayed in the Results Tab with any associated result messages and whether the record was manually added.

Banner Form

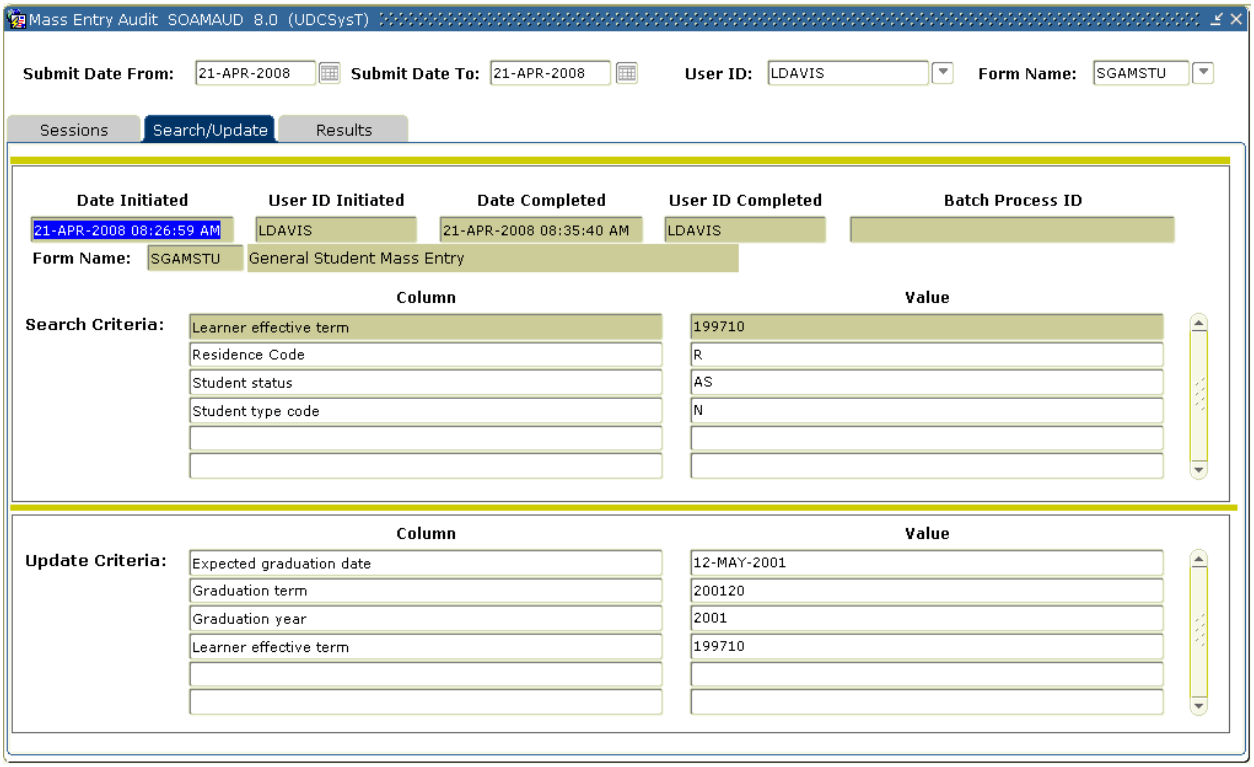


Steps

Follow these steps to review Mass Entry Audit files.

1. Access the Mass Entry Audit form (SOAMAUD).

2. Using the Key Block, enter the Submit Date From, Submit Date to, User ID and/or Form Name to search for Audit Session files. Select one, and move to the **Search/Update** tab.



3. Note the following data is contained at the top of the Search/Update Tab:

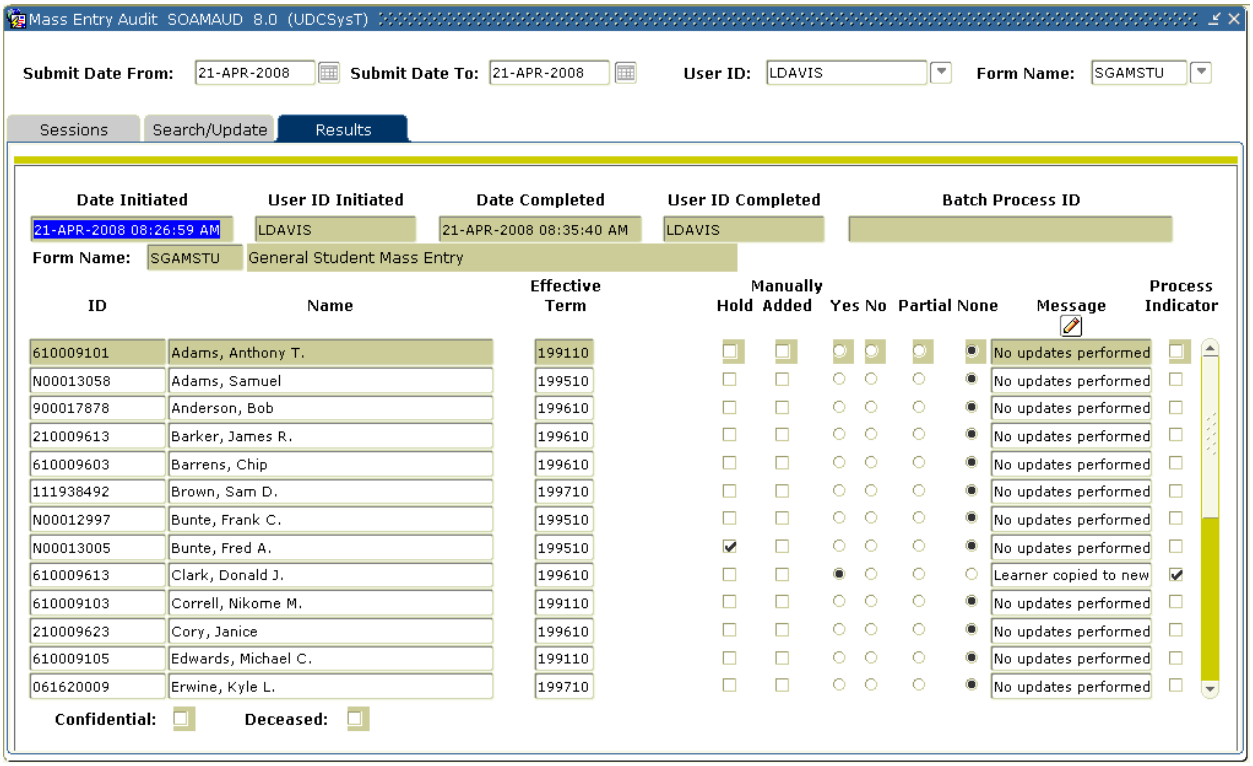
Field	Description
Date Initiated	The date the Mass Entry was initiated
User ID Initiated	User ID of the individual who initiated the Mass Entry.
Date Completed	The date the Mass Entry update was complete; If Batch process has not yet been run this field will be empty.

Field	Description
User ID Completed	User ID of the individual who ran the update; If Batch process has not yet been run this field will be empty.
Batch Process ID	The Batch Process ID assigned by the system to this session, if Batch processing was selected. If the update was processed in real time, this field will be empty.
Form Name	Identifies the form used for Mass Entry
Session Name	The name of the session selected

4. The Search Criteria from the original Mass Entry form is reproduced in the Search Criteria block on the **Search/Update** tab.

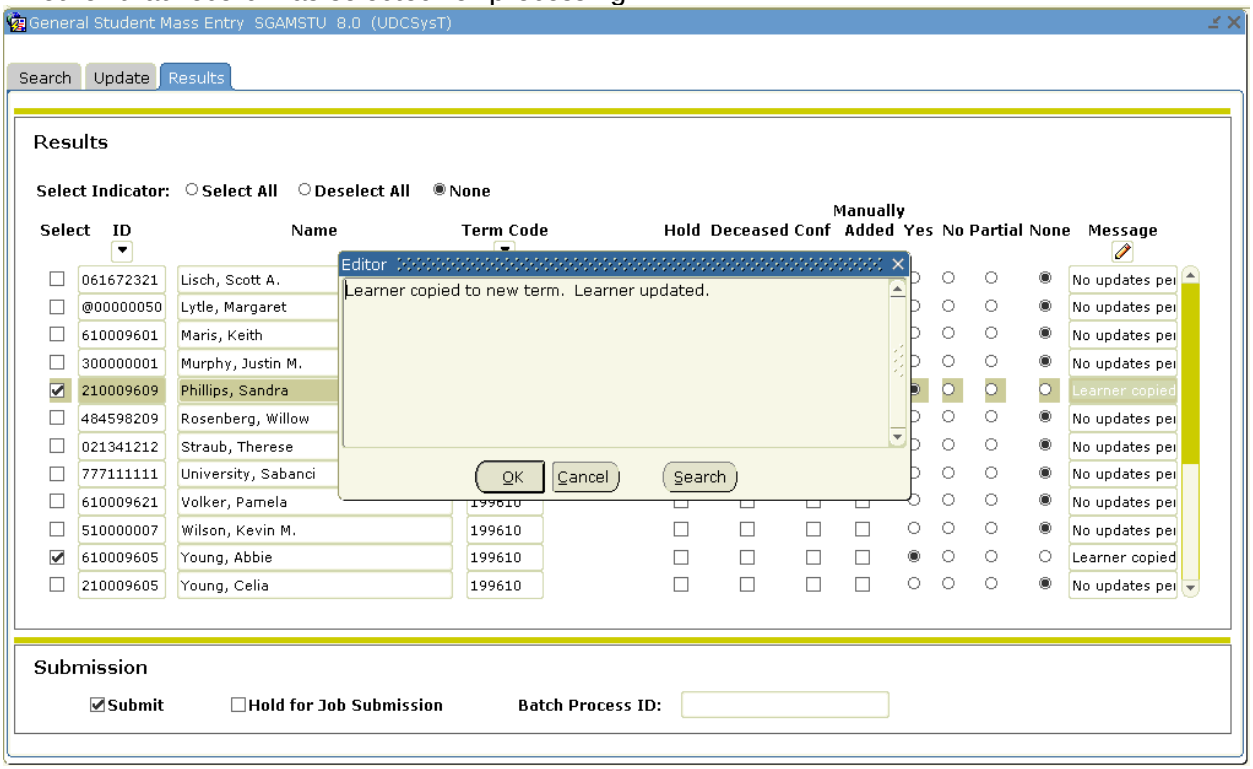
5. The Update Criteria from the original Mass Entry form is reproduced in the Update Criteria block on the **Search/Update** tab.

6. The Mass Entry process updates the mass entry tables with result codes and associated result messages once updates have taken place. Results may be viewed on the **Results** tab, and include both records selected for update, and records that satisfied the Search criteria that were not selected for update.



Note: The **Update** radio group in the **Results** tab show whether the updates were

successful (*Yes*), partially successful (*Partial*), not successful (*No*) or that no updates were considered (*None*). The **Message** field displays related result messages for the update, such as that shown in the illustration below. The **Process Indicator** shows whether that record was selected for processing.



7. The audit tables are updated when the mass entry updates are processed in real time on a mass entry form. The tables are also updated when job submission batch processing (SORMEBP) is run for updates that have been held for later processing.

8. After reviewing the results of your selected session, click on the **Exit** icon.

Mass Entry Batch Update

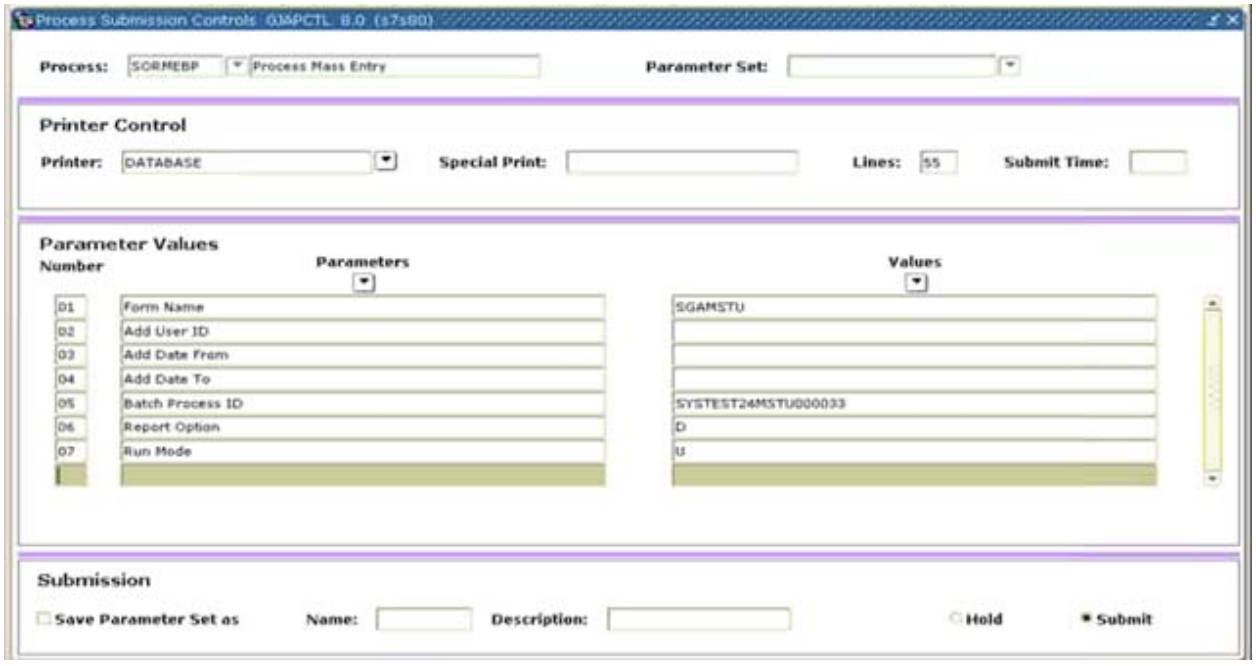
Overview

The Process Mass Entry Report (SORMEBP) is used to process mass entry updates in batch that are held for job submission processing in the Results tab of the mass entry form. When a process is held for job submission, all of the data is written to the Mass Entry Audit tables without a date completed or an update result, but with a batch process identifier. The batch process ID can be submitted through job submission using SORMEBP when you are ready to process the updates.

This report processes the mass entry updates based on the mass entry form name, the ID of the user who initiated the updates, the date and time the records were saved for batch update, and the batch process ID. Only records with no completion date are considered for update. Output is listed in alphabetical order and can show summary, detail or totals information.

The report can be run in Audit or Update mode. Audit Mode permits the user to run the batch process as a "trial," and the update results and associated messages are not shown on the report output. When run in Update mode, updates are made to the parent forms of the mass entry forms, and the audit table is updated with the ID of the user who ran the report, the date completed, the results and the setting of the Process Indicator on the Audit form.

Banner form



Steps

Use the following steps to execute the selected Batch process report.

1. Access the Batch Update Process Report (SORMEBP).

2. Leave the **Parameter Set** field empty.

3. Perform a **Next Block** function to access the Printer Control Block.

4. Double-click in the **Printer** field and select an available printer.

   Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.

5. Perform a **Next Block** function to navigate to the Parameter Values block.

6. Enter the Form Name into the Parameter Value block for Parameter 01

7. Parameters 02 – 04 are optional.

8. To find your Batch Process ID for Parameter 05 use the LOV button and select the Batch Process you wish to run.

9. For the Report Option parameter, enter D to show all students or S to show control totals.

10. Select the Run Mode. The choices are U (Update) or A (Audit). Update causes the Batch Process to run. Audit allows you to view the results without running the Batch process or updating the Student Record(s).

11. Press **Next Block** to move to the Submission block.

12. To save the parameter set for use again in future queries you can fill in the name and description fields, and click on the check box for Save Parameter Set as.

13. Click on the **Save** icon.

14. Click on the **Exit** icon.

15. To confirm that the Batch process did run, access the Mass Entry Audit form (SOAMAUD), and navigate to the Audit file associated with the Batch ID you just processed. You can then review the **Results** tab to note the results of the Batch process.

Mass Entry Purge Audit

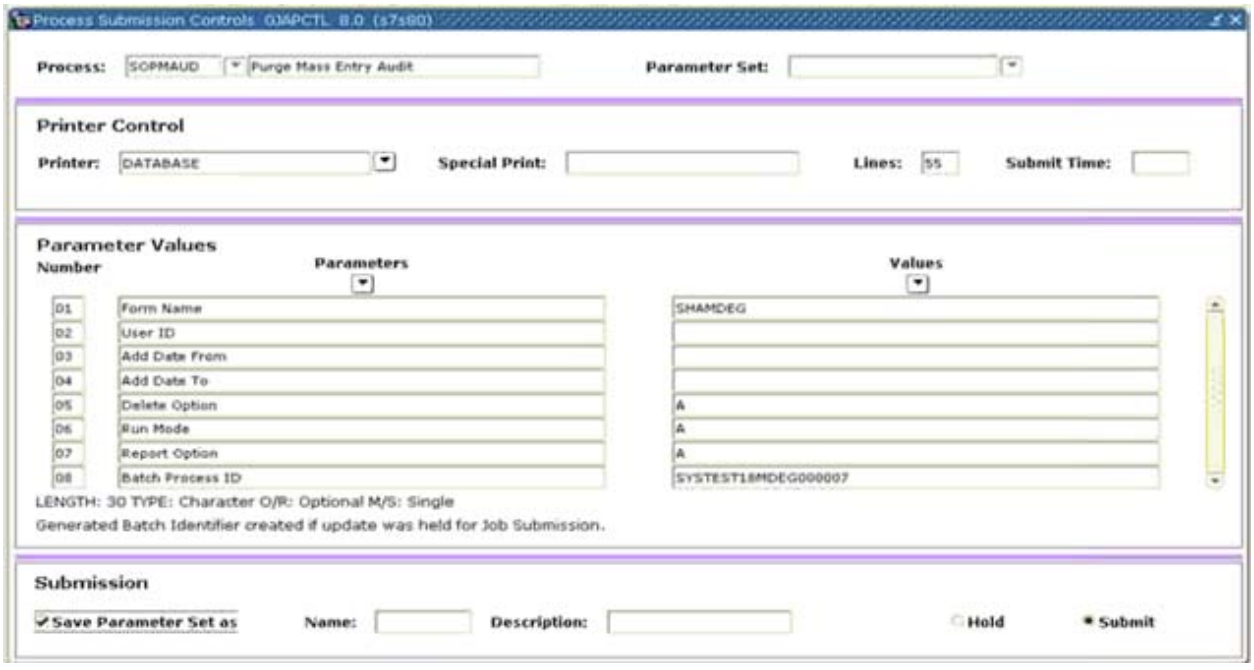
Overview

Audit tables may be very large, and you may wish to remove them after the processing is complete and the audit confirms the results. Records can be selected for deletion based on mass entry form, user ID, from and to dates, delete option (update status to be deleted), or batch process ID. The update status can be:

- All completed updates
- Failed updates
- Incomplete updates
- No updates
- Partial updates
- Successful updates.

The process can be run in Audit Mode or Update Mode, and can show summary, detail or totals information.

Banner form



Steps

Follow these steps to purge the Audit file you created earlier.

1. Access the Purge Mass Entry Audit form (SOPMAUD).
2. Leave the **Parameter Set** field empty.
3. Perform a **Next Block** function to access the Printer Control Block.
4. Double-click in the **Printer** field and select an available printer.

   Note: You can enter *DATABASE* to write the report to a table for on-line viewing and to enable the saving of the report to a shared folder on a designated network drive.
5. Press on **Next Block** to access the parameter values.
6. The form name is required. In this case, enter SGAMSTU.
7. Enter the Batch ID, if you created one when you executed SGAMSTU. You can also enter other parameters that will further narrow the list of sessions returned to you, such as your User ID or the Add Dates.
8. Parameter 05 specifies what you want to delete. Review your options from the LOV.
9. Parameter 07 specifies the type of report. Review your options from the LOV.
10. Click the Save icon to execute the report.

    Result: The Auto hint line displays the job submission number for the report log and list file.
11. Select Review Output on the Options menu to review the report.
12. Click on the Exit icon.

Summary

Let's review

As a result of completing this workbook, you have

- created a general student record
- changed a major and added a minor
- processed a leave of absence request
- entered veteran information
- added or changed advisor information
- entered additional student information
- entered cooperative education information
- created Communication Plan information
- viewed a student's information
- added and maintained a sports record
- maintained and monitored Right to Know reporting
- entered disability information
- entered EOPS information
- maintained required information
- performed purge processes
- performed mass entry of student records
- performed batch processing of mass entered student records
- audited mass entry records
- purged mass entry record audit.

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

What are the two forms you can use to create a student record?

Question 2

On SAAQUIK, which window do you access to add a student's major?

Question 3

What window on the General Student Form (SGASTDN) do you access to add or change a major?

Question 4

What other type of information can be entered on the Miscellaneous Student Information window?

Question 5

What form is used to enter veteran information?

Question 6

On the Multiple Advisors Form (SGAADVR), on which block is information returned to after an advisor is selected?

Question 7

What are the two ways that cohorts and attributes can be added to a student's record?

Question 8

Does an employer have to exist in the Banner system before you can add cooperative education information for a student?

Question 9

What are the validation forms are used with the Student Sport Form (SGASPRT)?

Question 10

What purge process do you run for a student who never registered?

Answer Key for Self Check

Question 1

What are the two forms you can use to create a student record?

Admissions Decision Form (SAADCRV)

Quick Entry Form (SAAQUIK)

Question 2

On SAAQUIK, which window do you access to add a student's major?

Curricula window

Question 3

What window on the General Student Form (SGASTDN) do you access to add or change a major?

Curricula window

Question 4

What other type of information can be entered on the Miscellaneous Student Information window?

Practical training

Question 5

What form is used to enter veteran information?

Veteran Information Form (SGASTDN)

Question 6

On the Multiple Advisors Form (SGAADVR), on which block is information returned to after an advisor is selected?

Advisor Information block

Question 7

What are the two ways that cohorts and attributes can be added to a student's record?

- **Created manually on the Additional Student Information Form (SGASADD)**
- **Rolled from the Admissions module when creating the student record**

Question 8

Does an employer have to exist in the Banner system before you can add cooperative education information for a student?

No. You can add an employer on the Employer Code Validation Form (STVEMPL).

Question 9

What validation forms are used with the Student Sport Form (SGASPRT)?

Student Activity Code Validation Form (STVACTC)

Sports Status Code Validation Form (STVSPST)

Eligibility Code Validation Form (STVELIG)

Question 10

What purge process do you run for a student who never registered?

The General Student Purge (SGPSTDN)

Appendix

Forms Job Aid

Form	Full Name	Use this Form to...
SAADCRV	Admissions Decision	enter decisions for an admissions application.
SAAQUIK	Quick Entry	quickly enter and register persons on the system.
SGAADVR	Multiple Advisors	associate student with multiple advisors. Also allows a view of student's advisors for an effective term range.
SGACLSR	Student Classification Rules	establish and maintain the academic classification rules based on the range of hours entered and user-defined student attributes. Requires STVCLAS, STVLEVL and STVATTR be established prior to creating this form.
SGACOOP	Cooperative Education	maintain data relating to student's cooperative education positions, including employer information and comments on duties involved.
SGADISA	Student Disability Services	capture information about disabilities, as well as services provided for those disabilities, for a student on a term-by-term basis.
SGAEOPS	Education Opportunity Programs and Services	record and monitor the EOPS information for a student based on an effective term.
SGAMSTU	General Student Mass Entry	create and/or update General Student records for the effective term. Requires SGASTDN for each ID selected.

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Form	Full Name	Use this Form to...
SGASADD	Additional Student Information	maintain cohort codes and attributes assigned to student by effective term. May be created manually or by rolling from the Admissions module on creation of student record.
SGASPRT	Student Sport	assign sport codes by term to a student. Track students by sport code, status code, eligibility code and term. Uses STVACTC, STVSPST and STVELIG.
SGASTDN	General Student	maintain current and historical information about a student.
SGASTDQ	General Student Summary	display all general student records on file for the specified term(s) for the student identified in the Key Information.
SGAUSDF	Institutional Reporting Requirements	maintain information about students which is specifically required by the institution on a term-by-term basis.
SGPHOLD	Hold Purge Process	purge all expired holds based on the user-specified parameters of expiration date, activity date and hold type.
SGPSTDN	General Student Purge Process	purge the general student information for a student who never registered based on the user-specified effective term and activity date.
SGRKNOW	Student Right To Know Report	produce data that will assist your institution in calculating graduation and completion rates by cohort and optionally by sport codes.
SOACOMM	Communication Rules	define the different types of Communication Plans as applied to campus, level, college and degree, and to define the rules for the automatic assignment of communication plans to people and the processing of the plan.

Form	Full Name	Use this Form to...
SOAFOLK	Guardian Information	establish and maintain information about a student's guardian. Guardian must exist in SPAIDEN first.
SOAMAUD	Mass Entry Audit Form	review mass updates for General Student.
SOPMAUD	Purge Mass Entry Audit	remove Audit table records.
SORMEBP	Mass Entry Batch Update Process	apply mass updates to General Student via batch updates.
SPAIDEN	General Person Identification	add or maintain general person IDs on the system.
STVACTC	Student Activity Code Validation	create, update, insert and delete activity codes, such as Debate Club or ROTC.
STVADVR	Advisor Type Code Validation	create, update, insert and delete advisor type codes for students, such as academic advisor or athletic advisor.
STVAFDC	Student CARE AFDC Duration Validation	create, update, insert and delete CARE AFDC codes. These codes indicate length of time a CARE student has been on AFDC at the time of enrollment for the current term.
STVASTD	Academic Standing Code Validation	create, update, insert and delete academic standing codes, such as Good Standing, Deans List or Suspension.
STVATTR	Attribute Validation	create, update, insert and delete degree program codes, such as Affiliated Teaching Requirement, Language Requirement or Writing Intensive Requirement.
STVATTS	Student Attribute Code Validation	create, update, insert and delete student attribute codes, such as First Year Student, Achieved Senior Standing or Non-degree Student.

Form	Full Name	Use this Form to...
STVBLCK	Block Code Validation	create, update, insert and delete block codes which are used in Block Scheduling processing. Represent sets or groupings of class sections.
STVCAMP	Campus Code Validation	create, update, insert and delete campus codes, such as Main Campus or Downtown Campus.
STVCAST	Combined Academic Standing Code Validation	create, update, insert and delete combined academic standing codes, which are defined by a combination of an academic standing code and a progress evaluation code.
STVCHRT	Cohort Code Validation	create, update, insert and delete cohort codes used in various modules to track a cohort grouping based on user-defined criteria.
STVCLAS	Class Code Validation	create, update, insert and delete class codes, such as Freshman or First Year Law.
STVCMTT	Comment Type Code Validation	create, update, insert and delete comment types and their respective codes, such as General Comment, Special Needs or Added via ACT Tape.
STVCPLN	Communication Plan Code Validation	create, update, insert and delete communication plan codes used in Recruiting, Admissions and General Student modules.
STVCREA	Cohort Reason Code Validation	create, update, insert and delete cohort reason codes, such as Peace Corps or Military Assignment. Used in conjunction with inactivation of a cohort for an individual to identify the reason for inactivation.

Form	Full Name	Use this Form to...
STVCTYP	Contact Type Code Validation	create, update, insert and delete recruiting contact type codes, such as Campus Visit, College Night or Merit List Letter.
STVDEPS	Student CARE Number of Dependents Validation	create, update, insert and delete codes indicating a CARE student's number of dependent children.
STVDISA	Disability Type Code Validation	create, update, insert and delete disability codes such as Blind, Multiple Sclerosis or Hearing Impaired.
STVDLEV	Degree Level Code Validation	create, update, insert and delete degree level codes, such as Associate, Bachelor, Master, etc.
STVELIG	Eligibility Validation	create, update, insert and delete eligibility codes, used in Student Right to Know tracking by SGASPRT.
STVEMPL	Employer Code Validation	maintain employer codes which represent employer's name, address and phone number.
STVEOPS	Education Opportunity Prog/Serv Status Validation	create, update, insert and delete EOPS status codes, such as No Service, Student Eligible or Student Not Eligible. Used by SGAEOPS.
STVESEL	Eligibility Factor Validation	create, update, insert and delete eligibility factor codes, such as Did Not Graduate HS NO GED, Financial Consideration or HS GPA below 2.5. Used by SGAEOPS.
STVLEVL	Level Code Validation	create, update, insert and delete level codes, such as No Level Declared, Undergraduate or Non-matriculated Graduate.
STVMARS	Student CARE Marital Status Validation	create, update, insert and delete codes which indicate marital status of a CARE student.

Form	Full Name	Use this Form to...
STVMEDI	Medical Code Validation	create, update, insert and delete medical codes, such as Blind, Deaf, or Prosthetic Limb. Used by GOAMEDI.
STVORIG	Originator Code Validation	create, update, insert and delete originator codes, such as Bursar's Office, Student Accounts or Dean of Students.
STVPREV	Progress Evaluation Code Validation	create and define valid progress evaluation codes.
STVRSLT	Appointment Result Code Validation	create, update, insert and delete appointment result codes, such as Attended Interview, Did not Attend, or Late to Interview.
STVSEPR	Services Provided Validation	create, update, insert and delete support services provided codes, such as Services Accepted, Services Provided, or Services Rejected.
STVSFAE	State F/A Eligibility Validation	create, update, insert and delete State F/A Eligibility codes, such as AFDC Recipient Status or SSi Recipient Status.
STVSPRV	Service Provider Validation	create, update, insert and delete the service provider codes, such as Training Center, Counseling Center or Learning Center.
STVSPSR	Disability Service Code Validation	create, update, insert and delete disability service codes, such as County Paratransit Service, Hearing Aid Required or Disabled Student Services. Used by GOAMEDI.
STVSPST	Sport Status Code Validation	create, update, insert and delete sport status codes. Used by SGASPRT.
STVSSER	Service Code Validation	create, update, insert and delete service codes, such as Day Care, Career Planning or Transportation.

Form	Full Name	Use this Form to...
STVSSRS	Service Result Validation	create, update, insert and delete student service result codes, such as Promotion Obtained, Job Obtained or Goal Not Met.
STVSSST	Services Status Validation	create, update, insert and delete services status codes, such as In Progress, Service Refused or Referred to Provider.
STVSTST	Student Status Code Validation	create, update, insert and delete student status codes, such as Active, Withdrawn, Inactive Due to Graduation.
STVSTYP	Student Type Code Validation	create, update, insert and delete student type codes, such as Returning Freshman, Continuing, Transfer. Specific student type codes are required for IPEDS reporting.
STVSUDA (through STVSUDJ)	Student Element One (through Ten) Validation	create, update, insert and delete institutional reporting data elements specific to an institution's needs for state or local reporting for a student. See SGAUSDF.
STVTRAC	Acceptance Reason Validation	create, update, insert and delete an EOPS Reason for Acceptance code, such as Accept Basis: Essay, Accept Basis: Financial Need or Eligibility Demonstrated.
STVVETC	Veteran Type Code Validation	create, update, insert and delete veteran type codes, such as Chapter 32 Post Vietnam Vet, Other Veteran or ROTC. Used by SGASTDN.
STVWTHD	Student EOPS/CARE Withdrawal Reason Validation	create, update, insert and delete codes which indicate reason for student's withdrawal from EOPS and/or CARE programs for the following term, such as Lack of Resources, Family Problems or Discontinued (Academic Reasons).

Terminology

Combined Academic Standing

This user defined code is a combination of an academic standing code and a progress evaluation code.

Cohort

A member of a group of students who have similar characteristics such as starting a program at the same time

Communication Plan

A set of rules designed to implement an institution's preferences regarding who should receive which materials and when those materials should be sent. Materials can be generated (letter or label) or published (department brochures).

Example: All accepted high school students who apply for admissions into the Education program receive a letter acknowledging acceptance into both the university and the Education program. However, all accepted high school students who apply for admissions into the Nursing program receive a letter acknowledging acceptance into just the university and instructions for next steps on how to apply at a later time to the Nursing program. Prospective nursing students also receive a Nursing program brochure along with their acceptance letter into the university.

EOPS

Education Opportunity Programs and Services.

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Student Right to Know Act

This legislation requires that an institution of higher education annually disclose information about its student body's completion and graduation rates.

For more information, refer to *Maintaining and Monitoring Student Right to Know Reporting* in *Section: Day-to-Day Operations* of this training workbook.